

# Markel MAGIC System Manual

*Manufactured Home*



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## ACCESSING MAGIC

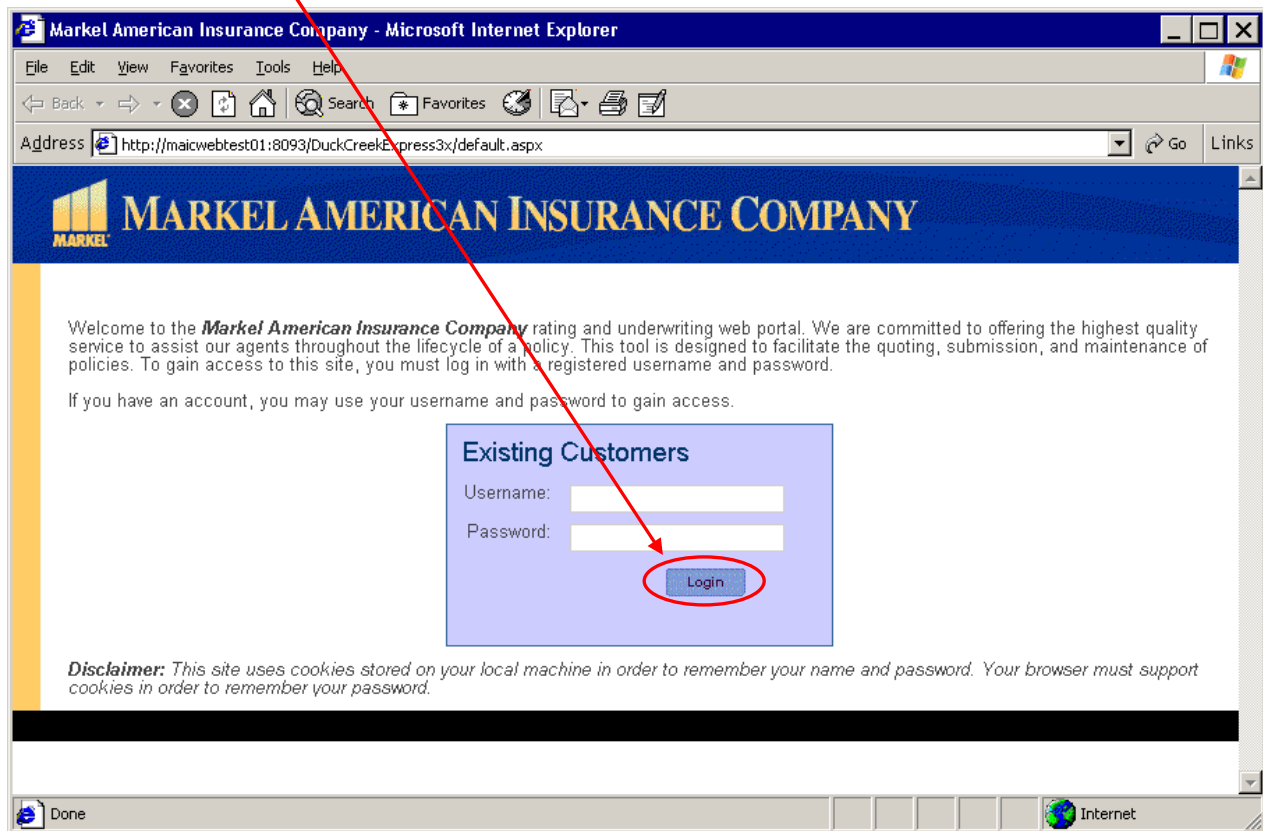
To gain access to the MAGIC site, open up a session on your internet browser. Type in the following URL <https://magic.markelamerican.com/magic> .

Press “ENTER” or “GO” and the MAGIC Welcome screen will appear as shown below.

## WELCOME SCREEN

An authorized username and password are required to log in to the MAGIC site.

1. Enter your “Username”.
2. Enter your “Password”.
3. Click the “Login” button.



The system will prompt a new User to change their password the first time they log in. See the section on Passwords for the required password format.

If you do not have a User account and need to have one set up, please complete the “Request to Amend Established User” form found at the back of this manual. All requests for new users must be completed by the General Agent.

Please email the completed form to [BPG@markelcorp.com](mailto:BPG@markelcorp.com) or Fax: 262-547-9436.

Once your user profile has been established, you will be emailed with a username and password to give you access to your account.

## NAVIGATION TOOL BAR

### HOME PAGE

Once logged in, the Home Page will display as shown below.

This screen will show any new and/or overdue messages that are in your Inbox. At any time while in the MAGIC system, simply click on “Home” and you will be brought back to this screen.

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx?XSLT=5skins/Markel

File Edit View Favorites Tools Help

Markel American Insurance Company

**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: ACTION INSURANCE INC

Home New Open Diary/Messages Password Logout

Welcome, Action Ins Agency

You have 2 new and 0 overdue message(s).

**Messages**

Date Originated	UserID	Origin...	Activity	Description	Policy #	Policy Eff Date	Attachments
6/23/2009, 10...	rtr@harley		New	<a href="#">Test Subject</a>			
4/10/2007, 4:...	dmeyer@we...		Endorse	<a href="#">Added son Jacob</a>			

Page 1 of 1

2 results found. Currently showing 1 - 2.

To retrieve/open a message in your Inbox, click on the description for that message. The description is displayed in a different color as a hyperlink. Upon retrieval, a new screen (as shown below) will appear.

The message displays with a great deal of information much like an email. Of special importance is the middle section which shows the message/reason (see area outlined in green below).

**Reminder:** This message Inbox is not a private Inbox like email. This is simply a messaging system.

**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: Statewide General Agency

indicates a required field.

Accept Message

**Message Information**  
Create Date: 2009-10-05 16:57:05    Created By: Ismoller  
  
Closed Date:    Closed By: System  
  
**Policy Information**  
Agency: Statewide General Agency    Client: Q.H.MILLER    Quote Number: QT00000058262  

**Message**  
Security Level: Public    Activity/Reason: Approved    Priority: Medium    Due Date: N/A  
Subject: QT00000058262 has been approved on 2009-10-05 MH APPROVED  
Body: The transaction has been approved on 2009-10-05. PHOTOS REC

Cancel    Load Policy

### Accept Message:

Upon clicking “Accept Message”, the “Post” option will appear. Once you have click on “Post”, the message will disappear from the Inbox on the Magic Home page. Other users will then be unable to retrieve the message to work on.

Once you have accepted the message you have taken ownership of it. You may then load the policy to work on it.

### Load Policy:

If the message originated from within a quote or policy, you may click the “Load Policy” button and this will take you directly inside the specific quote or policy.

### Cancel:

Clicking “Cancel” just closes the message so that it can be viewed later.

Clicking on “New” takes you to the new quote screen. This screen is standard for all Markel products

The screenshot shows a web browser window titled "Markel American Insurance Company - Windows Internet Explorer". The address bar shows a URL starting with "http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx?SLT=Skins/Markel". The page header features the Markel logo and the text "MARKEL AMERICAN INSURANCE COMPANY" with "Current Association: ACTION INSURANCE INC" below it. A navigation bar includes links for "Home", "New", "Open", "Diary/Messages", "Password", and "Logout". The main content area is titled "New Quote" and contains the following sections:

- Select the Agency and Producer**
  - General Agent: TRANSWESTERN GENERAL AGENCY
  - Producer Name: ACTION INSURANCE INC
  - Producer Number/Address: 10749 - 0A0616
- Select the Product and Program**
  - Property, MobileHome (dropdown menu)
- Quote Effective Date**
  - 12/11/2009
- Enter the Risk Location ZIP Code and TAB out of field**
  - Location ZIP Code: (text input)
  - Location State: (text input)

A note at the top right states: "\* indicates a required field". The browser's taskbar at the bottom shows several open applications, including "Inbox - Microsoft...", "MAGIC Develop...", "Markel American...", "Windows Ex...", "Markel MH Unde...", "MAGIC Property...", "MAGIC User Ma...", and "MH - Authority ...". The system clock shows 4:59 PM.

*For directions on how to process a New Quote,  
please see the section titled “Processing a New Quote” that follows.*



## OPEN

Clicking “Open” will take you to the screen where you can:

- search for an existing quote or policy
- search for items that have been sent for referral for your office to approve, decline, etc.

### Quick Search:

On the left hand side is a series of fields that are used in the Quick Search function. To quickly build a search filter, enter in a value or partial value, and/or select a value from the drop list. Then click the button to the right of each field you would like to search for. For example, to search of the name “Smith,” you would enter “Smith” into the name field and click the name button. To narrow the search you could set the LOB to Mobile Home by selecting Property Mobilehome from the LOB drop down and pushing the “Set LOB” button.

### Advanced Search for a Quote or Policy:

On the right hand side is the Filter Builder which allows you to select the criteria you would like to use to search for an existing quote or policy. (see screen shot below)

Markel American Insurance Company - Microsoft Internet Explorer

http://corpwebuat30:8083/express30/default.aspx?XSLT=5skins/Markel

**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: MARKEL AMERICAN INSURANCE CO

Home New Open Diary/Messages Password Logout

### Open Existing Quote/Policy

**Available Quotes And Policies** [Show/Hide](#)

**Quick Searches:**

[Name >](#)

[Quote/Policy # >](#)

[Set LOB](#)

**Advanced Search:**

and  Name  contains [Add Filter](#)

[Quick Query:](#) [Apply](#)

☐ Save Filter [Clear](#)

**Current Filters:**

Policy No greaterthan

☐ View Deleted

[Quote Referral](#) [Service Request](#)

[Save Table Settings](#) [Restore Defaults](#)

Policy/Quote Number	Insured Name	State	Line	Status	Transaction	Description	Eff. Date	Last Modified
---------------------	--------------	-------	------	--------	-------------	-------------	-----------	---------------

Page 1 of 1

Local intranet

To use the Filter Builder, use the drop down boxes to select the criteria you wish to filter on.

For example, say a new quote was started, and you can only remember the last name of ‘Smith’.

1. In the first drop down box, select "Name".
2. In the second Drop down box, select "contains".
3. In the third box, enter "Smith".

You can also do partial searches on the insured name by following the instructions above and entering only part of the insured's name.

**Open Existing Quote/Policy**

Available Quotes And Policies

Quick Searches:

Property\_MobileHome

Advanced Search:

and LOB contains

Quick Query:

Save Filter

Current Filters:

Policy No greater than 10749

LOB contains Property\_MobileHome

View Deleted Include Previous Terms

Quote Referral Service Request

Policy/Quote Number	Insured Name	State	Line	Status	Transaction	Description	Eff. Date	Last Modified
QT00000060015	AMY TAVERA	AZ	Property_MobileHome	Quote	New-Pending	GA: 10749 - 0A...	11/20/2009	11/24/2009
QT00000060180			Property_MobileHome	Quote	New-Pending		11/24/2009	11/24/2009
QT00000060254			Property_MobileHome	Quote	New-Approved	GA: 10749 - 0A...	11/25/2009	12/3/2009
QT00000060181			Property_MobileHome	Quote	New-Pending		11/24/2009	11/24/2009
QT00000060187			Property_MobileHome	Quote	New-Pending		11/24/2009	11/24/2009
MMH00000070339			Property_MobileHome	InForce	Endorse-Comm...	GA: 10749 - 0A...	11/30/2009	11/29/2009
QT00000060234			Property_MobileHome	Quote	New-Pending	GA: 10749 - 0A...	11/24/2009	12/1/2009
MMH00000070578			Property_MobileHome	InForce	New-Committed	GA: 10749 - 0A...	12/10/2009	12/10/2009
MMH00000070356			Property_MobileHome	InForce	New-Committed	GA: 10749 - 0A...	11/23/2009	11/24/2009
QT00000059697			Property_MobileHome	Quote	New-Pending	GA: 10749 - 0A...	11/23/2009	11/23/2009

79 results found. Currently showing 1 - 10.

4. Then click the "Add Filter" button. This will move your selected criteria to the "Current Filters" section. (See screen print above.)
5. Once you have selected all the items you wish to search on, click "Apply" and the system will search for any matches to your criteria. (See screen print above.)

You may add multiple filters to narrow down your search results. Or you may delete filters by clicking on the "Trash can" next to the filter criteria.

## Searching for Referred items:

In the middle of the screen there are 2 buttons that allow you to search for items that have been referred to your office for approval—Quote Referral and Service Request (see the area outlined in red below).

### Sorting Results:

Clicking on a blue column header will sort the results by the column. Click on the header again to reverse the order.

Markel American Insurance Company - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Address <http://maicwebtest01:8093/DuckCreekExpress3x/default.aspx?XSLT=Skins/Markel#> Go Links

**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association

Home New Open Diary/Messages Password Logout

## Open Existing Quote/Policy

**Available Quotes And Policies** [Show/Hide](#)

**Quick Searches:**

[Name »](#)

[Quote/Policy # »](#)

[Set LOB](#)

**Advanced Search:**

and  Name  contains [Add Filter](#)

[Quick Query:](#) [Apply](#)

☐ Save Filter [Clear](#)

**Current Filters:**

Policy No greaterthan

☐ View Deleted

☐ Include Previous Terms

[Quote Referral](#) [Service Request](#)

### Quote Referral:

The “Quote Referral” button allows you to quickly search for quotes that have been referred to your office for approval. When you click on “Quote Referral” a list of all the quotes that have been referred to your office will appear.

Click on the quote # to load the quote to work on it. Review the request and then proceed to the Submission page.

If you have authority, you will have the choice to Approve or Decline the risk or alternatively refer it to MAIC if you desire a 2<sup>nd</sup> opinion. Once you choose Approve, Decline or Refer, a message box will appear where you may add a message. Add the message and click OK. The risk will then be sent back to the requestor as Approved or Declined, or it will be sent to MAIC as a referral.

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#

File Edit View Favorites Tools Help

Markel American Insurance Company

**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: ACTION INSURANCE INC

Home New Open Diary/Messages Password Logout

Current Quote/Policy In Progress: **DAVID MAGERS**

## Open Existing Quote/Policy

**Available Quotes And Policies** Show/Hide

**Quick Searches:**

☐ Save Filter

**Advanced Search:**

and  LOB  contains

Quick Query:

**Current Filters:**

Policy No greaterthan ""

LOB contains Property\_MobileHome

☐ View Deleted

	Policy/Quote Number	Insured Name	State	Line	Status	Transaction	Description	Eff. Date	Last Modified
	<a href="#">QT00000060563</a>	SUSAN CISZ	AZ	<a href="#">Property_Mobil...</a>	Quote	New-Pending		12/2/2009	12/2/2009
	<a href="#">QT00000060572</a>	SUSAN CISZ	AZ	<a href="#">Property_Mobil...</a>	Quote	New-Pending	GA: 10749 - 0A...	12/2/2009	12/2/2009
	<a href="#">QT00000060565</a>	SUSAN M CISZ	AZ	<a href="#">Property_Mobil...</a>	Quote	New-Pending		12/2/2009	12/2/2009
	<a href="#">QT00000061149</a>			<a href="#">Property_Mobil...</a>	Quote	New-Referred	GA: 10749 - 0A...	12/10/2009	12/10/2009
	<a href="#">QT00000061150</a>			<a href="#">Property_Mobil...</a>	Quote	New-Referred	GA: 10749 - 0A...	12/10/2009	12/10/2009
	<a href="#">QT00000061152</a>			<a href="#">Property_Mobil...</a>	Declined	New-Declined	GA: 10749 - 0A...	12/10/2009	12/10/2009
	<a href="#">QT00000061023</a>			<a href="#">Property_Mobil...</a>	Quote	New-Pending	GA: 10749 - 0A...	12/9/2009	12/9/2009
	<a href="#">QT00000061025</a>			<a href="#">Property_Mobil...</a>	Quote	New-Pending	GA: 10749 - 0A...	12/9/2009	12/10/2009
	<a href="#">MMH00000070540</a>			<a href="#">Property_Mobil...</a>	InForce	Endorse-Comm...	GA: 10749 - 0A...	12/7/2009	12/8/2009

Page 3 of 8

79 results found. Currently showing 71 - 79.

## 1. View Details & History:

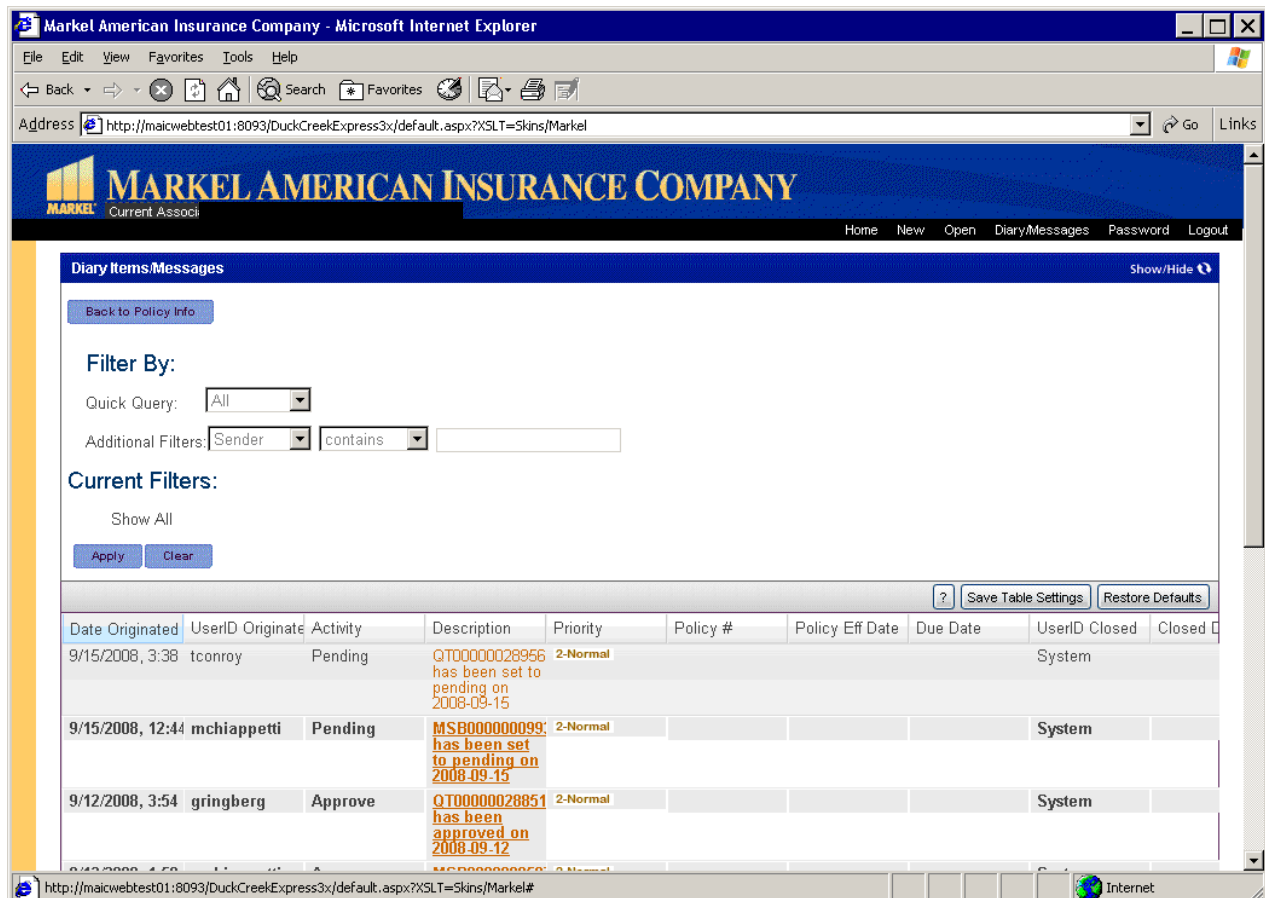
Clicking the “View Details & History” button will take you to the [Detail screen](#).

- Locked Policy:** The padlock icon will appear when another user has the file open/checked out. The name of the user who has it checked out displays on the bottom of the TransACT page.

## DIARY/MESSAGES

Clicking on “Diary/Messages” from the toolbar will take you to your Inbox.

To open a Diary Item, click on the bold description. (The description is displayed in a different color.) If you hover over the description with your mouse, the description will be highlighted. This is called a hyperlink.



By clicking on this hyperlink you will retrieve the message, and a new screen will appear.



**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: Statewide General Agency

*indicates a required field.*

Accept Message

**Message Information**  
Create Date: 2008-05-14 15:09:54 Created By: mkotovic  
Closed Date: Closed By: System  
**Policy Information**  
Agency: Client: Policy Number:  
**Message**  
Security Level: Activity/Reason: Priority: Due Date:  
Public Approved Medium N/A  
Subject: QT00000012605 has been approved on 2008-05-14  
Body: The transaction has been approved on 2008-05-14. APPROVED AT PURCHASE PRICE. THANK YOU.  
Cancel Load Policy

When you are finished with the message you may “Cancel” the message, or click on the “Accept Message” and then “Post” to delete the message from your inbox.

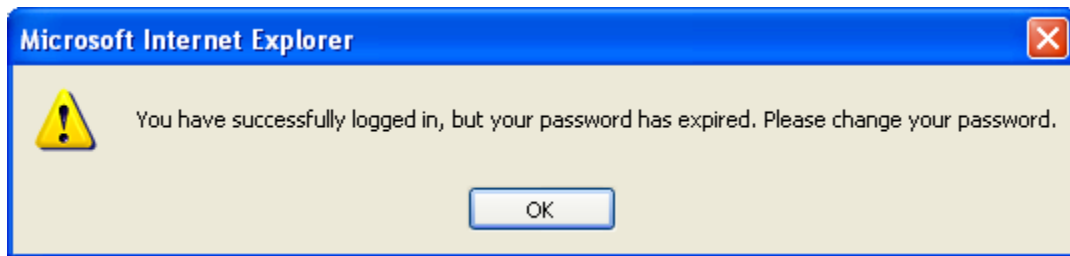
**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: Statewide General Agency

*indicates a required field.*

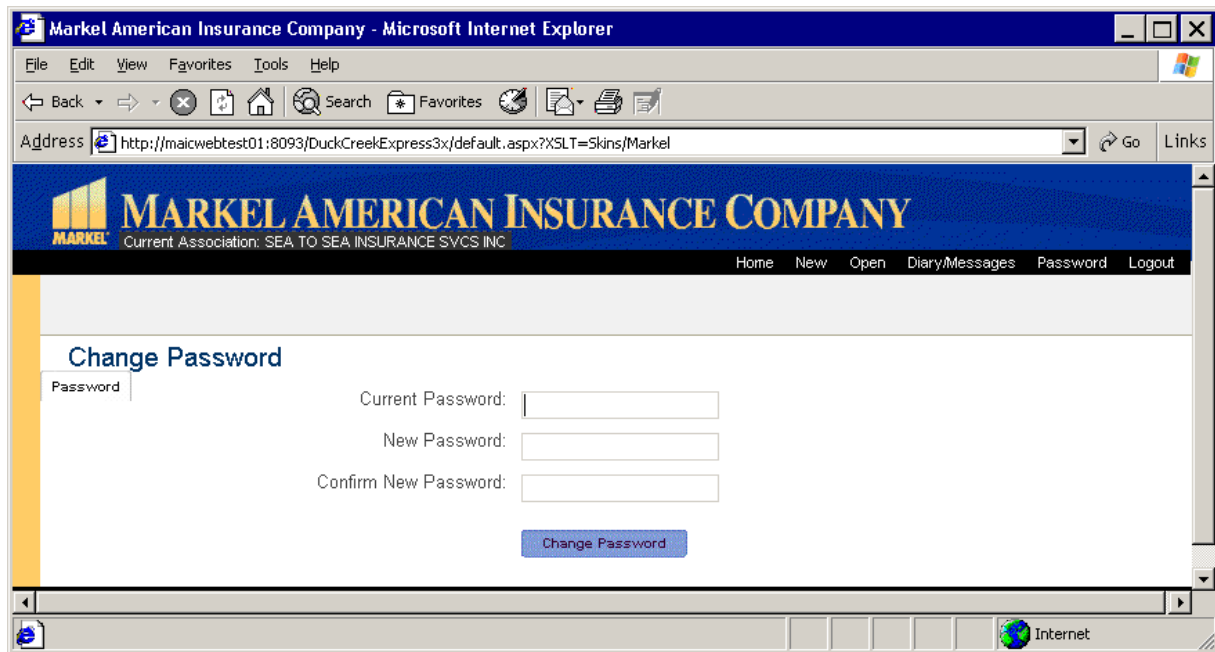
**Message Information**  
Create Date: 2008-05-14 15:09:54 Created By: mkotovic  
Closed Date: Closed By: System  
**Policy Information**  
Agency: Client: Policy Number:  
**Message**  
Security Level: Activity/Reason: Priority: Due Date:  
Public Approved Medium N/A  
Subject: QT00000012605 has been approved on 2008-05-14  
Body: The transaction has been approved on 2008-05-14. APPROVED AT PURCHASE PRICE. THANK YOU.  
Post Cancel Load Policy

## PASSWORD

The first time a new user logs in the password will expire. The following message will appear:



1. Click "OK". The Change Password Screen will appear as shown:



2. Enter in your old password.
3. Determine what your new password will be based on the following rules:
  - The password cannot contain the user's first name, last name or login
  - It cannot contain spaces
  - Must be at least 10 characters long
  - 1 upper case, 1 lower case, one numeric and one special character must be included
  - Cannot match the previous password

Ex.   Badgers.2007  
      Alabama!99  
      HAPPY2cu2#

4. Enter in your new password following the guidelines above, and then enter in your new password again.

5. Click "Change Password".
6. If the password change is complete you will receive the following message:



7. You may now proceed as normal.

If you do not have a User account and need to have one set up, please complete the "Request to Amend Established User" form found at the back of this manual. All requests for new users must be completed by the General Agent.

Please email the completed form to [PBG@markelcorp.com](mailto:PBG@markelcorp.com) or Fax: 262-547-9436.

Once your user profile has been established, you will be emailed with a username and password to give you access to your account.

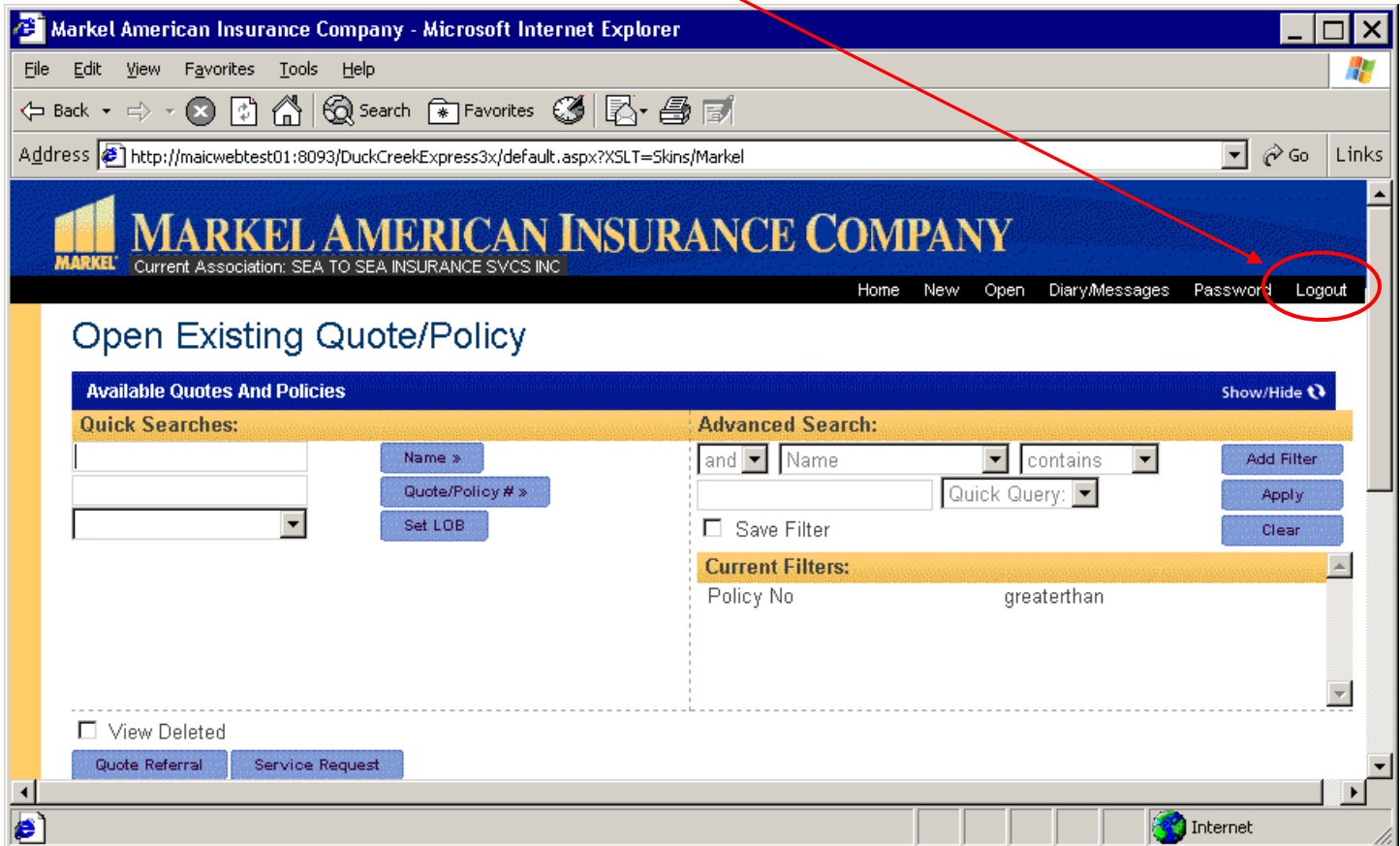


## LOGOUT

Clicking on “Logout” will log you out of the system.

You will then need to close your internet browser session to be completely out of the system.

To close your internet browser session, click the red “X” in the upper right-hand corner.



## PROCESSING A NEW QUOTE

### GENERAL NOTES:

- Note that the various mobile home usages may have varied field requirements and coverage offerings.
- To process a rate indication in MAGIC the user will be required to fill out minimal information on the owner, usage, and unit and then proceed to the coverage page. Insurance score will be pulled for a rate indication. The rate indication assumes that the applicant is loss free. Underwriting eligibility is not checked for a rate indication.
- To process a full quote in MAGIC, the user will go through a series of screens completing all yellow highlighted fields with an asterisk (\*) or as prompted by the system. To issue a policy, the user will need to complete all the blue colored fields.
- Do not use the ampersand (&) symbol as it will cause an error.
- All quotes are good for 60 days. Once a quote expires you will see a Reset Quote Tab, unless the quote has been left in an approved status. If this occurs you will need to re-pend the quote to receive the reset quote button.
- Wherever there is a drop down box, you can repeatedly type the first letter of the word to find your selection or you may click the drop down arrow and scroll to your selection.
- It is not necessary to type the slashes and dashes in phone numbers, dates of birth, etc. Simply click the "Tab" key and the field will be automatically formatted.
- Bind restriction rules (when in place) have been built into the system at the beginning of the quote process. You will receive a warning that quote can only be bound without physical damage coverage. You will be able to proceed to rating and will be able to either issue the policy with the exclusions OR choose to refer to company with further information.
- You may use the **Previous** button or **Back** button to click from page to page in order, or you may click on the appropriate tab that you need to go to. Click the **Save for Later** or **Exit** Buttons to save what you are doing and work on something else.

Upon starting a quote a unique quote number will be assigned. At any time, you can Click 'Save and Exit' and the quote may be exited and retrieved.

Depending on each user's authority, the functionality will vary slightly.

- If the risk is over their authority, they may only process an indication of premium. The risk must then be referred for approval.
- If the risk is within their authority, they may process the quote, issue the policy, apply a payment and perform all maintenance (contracted agent only).

## NEW QUOTE SCREEN

To begin a new quote, click on “New” from the toolbar. This will take you to the first screen of the New Quote process.

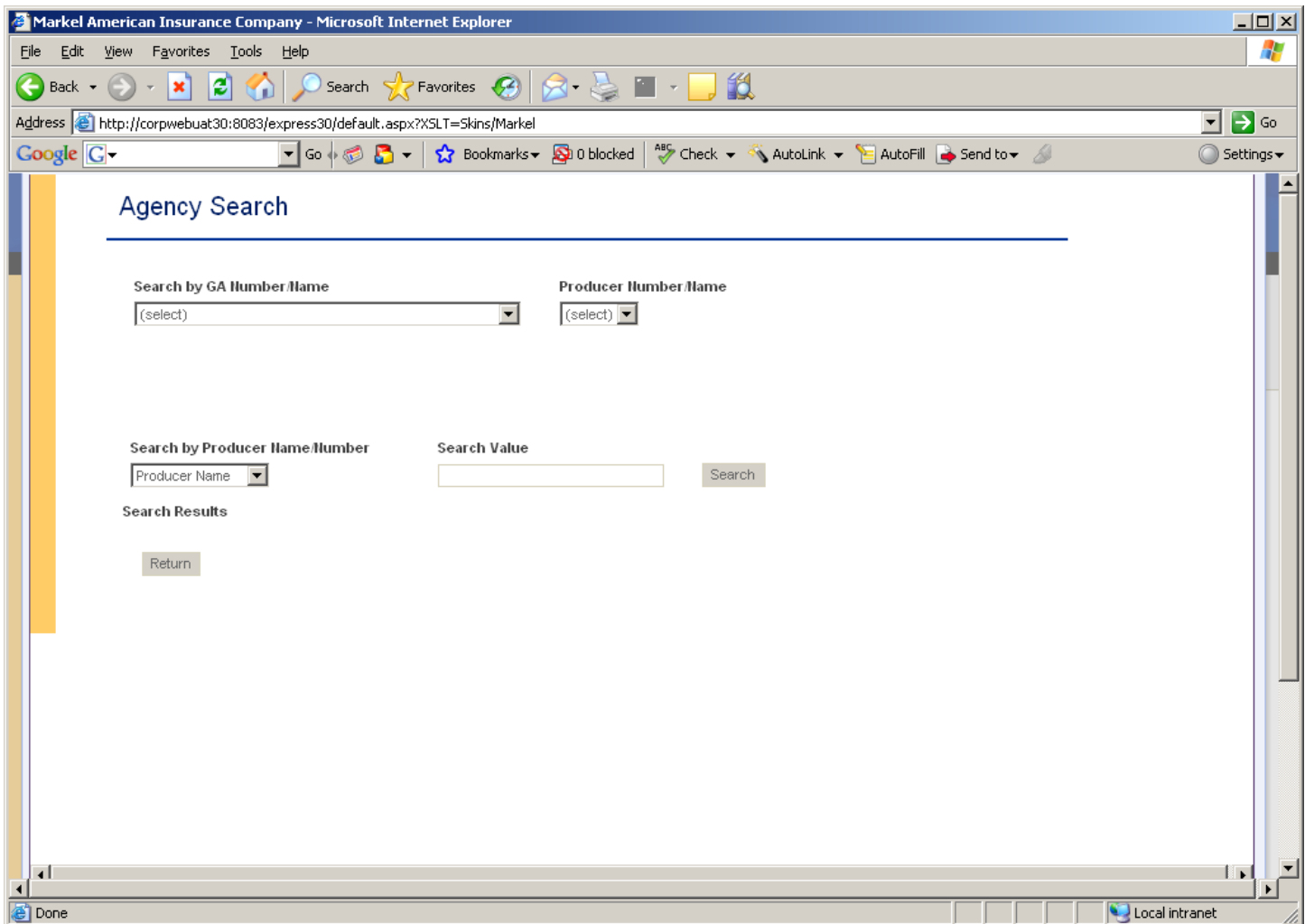
The screenshot shows the 'New Quote Selection' screen of the Markel American Insurance Company website. The browser is Windows Internet Explorer, displaying the URL <http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx?XSLT=Skins/Markel>. The page features the Markel American Insurance Company logo and navigation links: Home, New, Open, Diary/Messages, Password, and Logout. The main content area is titled 'New Quote' and includes a sidebar with a 'New Quote' link. The form contains several sections: 'Select the Agency and Producer' with a 'General Agent' dropdown menu (selected: AMERICAN UNDERWRITING MGRS AGCY INC) and a 'Producer Name' dropdown menu (selected: MH AGENCY); 'Select the Product and Program' with a dropdown menu (selected: Property\_MobileHome); 'Quote Effective Date' with a date field (11/4/2009); and 'Enter the Risk Location ZIP Code and TAB out of field' with a 'Location ZIP Code' field (40202) and a 'Location State' field (KY). A 'Find Producer' button is located next to the 'Producer Number/Address' field (90199 - 1234123). At the bottom, there are buttons for 'Full Quote' and 'Rate Indication'. The status bar at the bottom indicates 'Done' and 'Local intranet'.

### Select the Agency & Producer:

When you log in, your Agency will automatically be listed as the “General Agent”. Note: when a sub-producer logs in, the GA will be identified as will the subproducer agency name. There are no other options for the sub producer.

Select the subproducing agency’s name from the drop down list located under “Producer Name”. Once you select the Agency from the list, their Producer Number will appear to the right.

You can also click the “Find Producer” button. The following screen will appear:



Using the Find Producer feature, you are able to search by the Producer Name or the Producer Number. There must be a sub-producer selected in order to continue. Select the Return button to get back to the New Quote screen.

### Select the “Product/Program”:

Select the appropriate Product/Program to quote from the drop down box.

### Effective Date:

The Quote Effective date will default to today’s date.

**Note: The policy effective date can be set at time of issuance. Failure to have the correct effective date at issuance will require the policy to be canceled and re-issued.**

**Zip Code:**

Enter the Zip Code of the location where the risk is located. Hit "TAB" or click on the screen and the location state will populate

When the zip code is entered, the system will check to ensure that MAIC is accepting new business in that area at the current time. If not, the user will be notified accordingly.

**Note: The system will not allow the quote to continue if a zip code is entered for a risk state where your Agency is not licensed to do business with MAIC, if the subproducer is not licensed in that state or if your Agency's current license for that state is not on file with MAIC.**

If all required fields are acceptable, both the "Full Quote" or "Rate Indication" buttons will appear and clicking either one will force you to proceed initially to the [Special Notices Screen](#).

If you choose "Full Quote:" option you will be taken through the normal quote process where a final rate will be generated. Please note that if you are quoting a **rental schedule**, you will have to use the "Full Quote" option.

If you choose "Rate Indication" you will fill out minimum information to deliver a rate indication and then proceed to the coverage screen.

## SPECIAL NOTICES SCREEN

The [Special Notices Screen](#) provides the applicable Fraud Warning as well as a disclosure regarding Insurance Score use. Content of warnings could change depending on risk location state.

**NOTE: It is the responsibility of the agent to review this information with the applicant *prior* to starting a quote.**

The screenshot shows a web browser window titled "Markel American Insurance Company - Windows Internet Explorer". The address bar displays "http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The toolbar shows a "Live Search" button and a "Page" menu. The website header features the Markel American Insurance Company logo and the text "Current Association: MARKEL AMERICAN INSURANCE CO". A navigation bar at the top right includes links for "Home", "New", "Open", "Diary/Messages", "Password", and "Logout". The main content area is titled "Special Notices" and contains two sections: "Fraud Warning:" and "Consumer Notice of Insurance Scoring:". The "Fraud Warning:" section states: "It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits. Your state may have specific warnings against filing false claim information." The "Consumer Notice of Insurance Scoring:" section states: "To offer an accurate quote in connection with this application for insurance, we will use a credit-based insurance score developed by a third party based on information contained in the unit owner's credit report. Future reports may be used to update or renew insurance." Below these sections, a text box reads: "By proceeding with the quote, I confirm compliance with disclosure requirements." A "Continue" button is located at the bottom of the page. The status bar at the bottom of the browser window shows "Done" and "Local intranet".

Upon clicking "Continue" the user is attesting that this information was disclosed to the applicant.

If User chose the Rate Indication option on the initial New Quote screen, then User will proceed to the [Rate Indication Data and Coverage Screens](#).

If User chose the Full Quote option on the initial New Quote screen, then User will proceed to the [Marketing Screen](#)

## RATE INDICATION DATA SCREEN

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#

File Edit View Favorites Tools Help

Markel American Insurance Company

(Quote - New-Pending)  
- Property\_MobileHome  
AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY

Rate Indication Data Coverage Save and Exit

\* indicates a required field

RATE INDICATION IS BASED ON THE FOLLOWING ASSUMED INFORMATION:  
Assumes applicant is loss free. Rate indication only. Rate may change if applicant has prior losses.  
Not an offer of coverage and subject to all underwriting guidelines.  
After successfully completing the fields on this screen and reviewing the rate on the Coverage page, you can proceed to the Full Quote process.  
The information you entered in the Rate Indication will be transferred to the Full Quote.

First Name \*  
Middle Initial  
Last Name \*  
Suffix (Select)  
Date of Birth \*  
SSN  
Mailing ZIP \*  
Mailing Address 1 \*  
City/County (select) \*  
Mailing State  
Usage Owner Occupied \*  
Location ZIP 40202 \*  
City/County (select) \*  
Year \*  
Unit Width Double \*  
Unit Value 0 \*  
Protection Class 1-6 \*  
Term 12 Months

Next

Rating assumptions are shown at the top of the page. All information is required to get a Rate Indication. Any information entered on these screens will transfer over into the Full Quote process if that option is chosen.

Upon clicking "Next" the user will proceed to the [Rate Indication Coverage Screen](#).



## RATE INDICATION COVERAGE SCREEN

The [Rate Indication Coverage Screen](#) found in the Rate Indication process is the same [Coverage Screen](#) that you will view if you switch over to the Full Quote process so more details can be found there. You may adjust the Coverage values as necessary and system will rerate automatically.

### Coverage Selection:

**Standard Package** – An owner occupied risk will default to a standard package. The package coverage and limits can easily be changed by un-checking the “Standard Package” checkbox.

**No Dwelling Coverage** – If your applicant is interested in liability only coverage, checking the “No Dwelling Coverage” box will remove all property coverage.

**No Liability Coverage** - If your applicant is interested in property only coverage, checking the “No Liability Coverage” box will remove all liability coverage.

### Save and Exit:

If the Rate Indication is done being processed and no further action is required at that time, click “Save and Exit”. The Rate Indication can then be retrieved at any time.



### Print Rate Indication:

Clicking “Print” will prepare the Rate Indication as a PDF file that can be printed and emailed. As the Rate Indication is not a final rate, this will be so indicated on the form along with pertinent notices and disclosures. The PDF becomes part of the Rate Indication and will be found in the Diary/Attachment section.

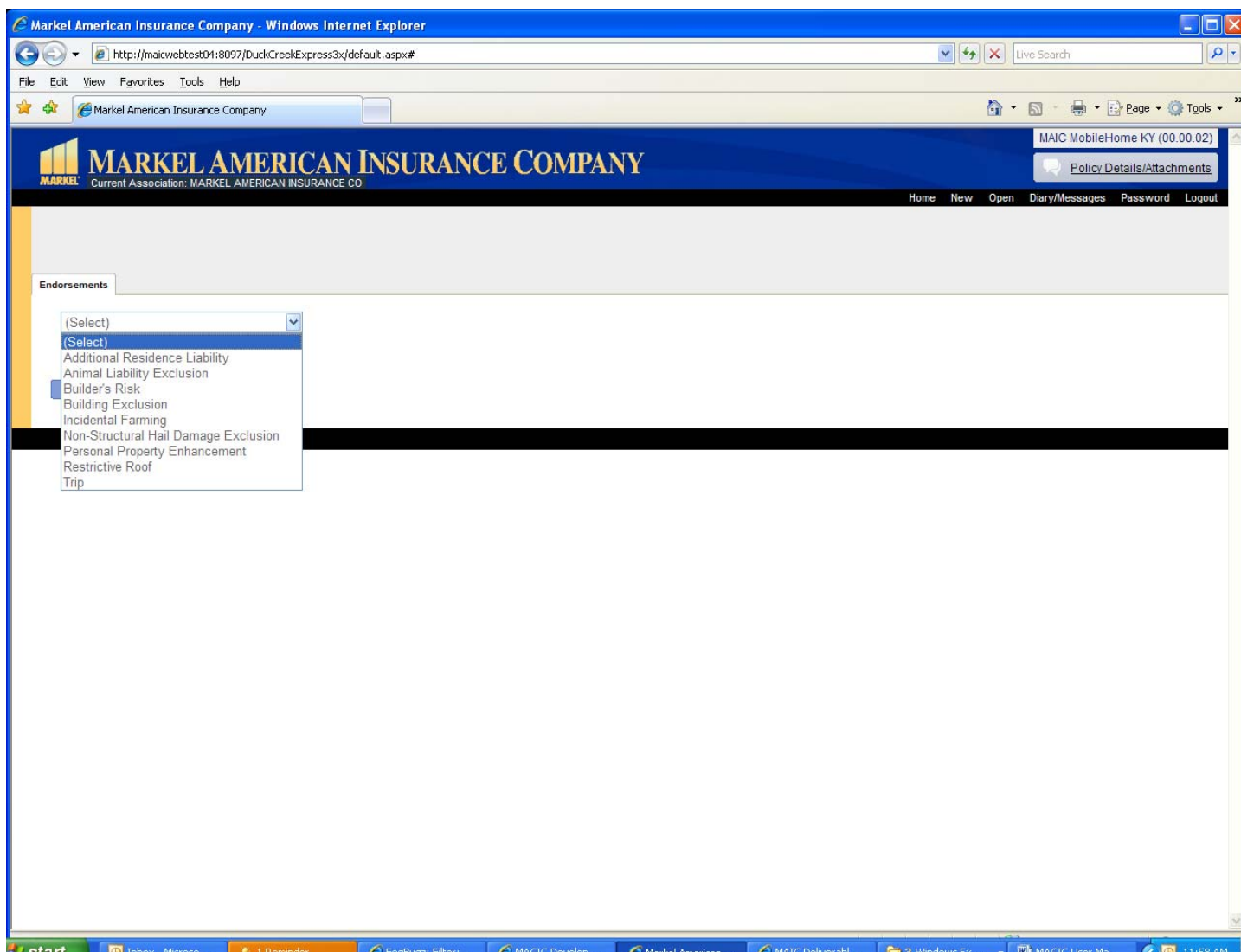
Upon clicking print, a box will appear that allows you to enter notes that will print on the form. If you wish to enter notes, do so, and then click “Print”.

### Switch to Full Quote:

If you want to develop the Rate Indication into a Full quote containing a final rate, click “Switch to Full Quote” and you will rejoin the Full quote process on the [Marketing Screen](#).

### Endorsements Button:

If desired, you can attach endorsements to the Rate Indication in the event you want to have coverage included or excluded as part of the general Rate Indication. Clicking the Endorsement button will take you to the Endorsement attachment screen: Select your endorsement and then click “Add”.



## MARKETING SCREEN

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#

File Edit View Favorites Tools Help

Markel American Insurance Company

MARKEL AMERICAN INSURANCE COMPANY  
Current Association: AMERICAN UNDERWRITING MGRS AGCY INC

MAIC MobileHome KY (00.00.02)  
Policy Details/Attachments

Home New Open Diary/Messages Password Logout

(Quote - New-Pending)  
- Property\_MobileHome  
AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY

Marketing Save and Exit

\* indicates a required field

Renewal of current Markel American policy? No

Personal or Corporate/ Trust Ownership? Personal

Usage Owner Occupied

Term 12 Months

Current Insurer (select)

MAIC Approved Book Roll ☐

Continue

Regardless if you initially chose the Full Quote process or the Rate Indication Process, the processes rejoin again at the [Marketing Screen](#).

### Renewal of Markel American Policy:

This field will automatically default to “No”. If the policy is going to be a manual renewal of a current Markel American policy in the Paragon system, select “Renew.” If policy is going to be a rewrite of a current Markel American policy in the Paragon system (usually due to non-pay cancellation in Paragon), select “Reissue”. If you choose either the “Renew” or “Reissue” option, a field will present asking you to enter the previous Paragon policy number. You must enter the exact number but do not include the edition number. Example: MMH00123446

### Ownership Type:

This field will automatically default to “Personal”. If unit is owned by Corporation or Trust, change the ownership type which will then present the correct Owner screen for you to complete.

### Usage Type:

This field will determine whether the Unit is Owner Occupied, Seasonal, Rental, Vacant or Tenant. It is very important to make sure you choose the correct Usage as the choice drives rates, forms and business rules and if chosen incorrectly, the policy will need to be flat cancelled and rewritten to correct Usage type.

### Current Insurer:

This field contains a dropdown box to identify the current carrier of applicant.

### MAIC Approved Book Roll:

This field will usually be 'unchecked' and is only used when you are rolling a book of business from another company to Markel. It controls special commission rates and some forms attachment.

**Note: This field cannot be utilized without permission from the Markel.**

Upon clicking "Continue" the user will proceed to the [Owner Screen](#)

## OWNER SCREENS

---

In lieu of commenting on each field entered on the [Owner Screen](#), only those fields that require special attention will be noted below.

The [Owner Screen](#) is designed to capture the required information regarding the owner(s) of the unit. Accuracy of the information entered on this page is critical to ensure that an insurance score is able to be obtained. If the unit is titled in a Corporate Name and this was indicated on the [Marketing Screen](#), the [Owner Corporate/Trust Screen](#) will appear.

Although it is not a requirement to obtain/enter the Social Security number of the owner, the Social Security number is the best means of securing the correct insurance score. **The insurance score can have a favorable impact on the overall rate. Therefore, obtaining a Social Security number in the quote process can be very beneficial for the applicant.**

If during the quoting process our Insurance Score provider is not accessible, no rate will be delivered and the quote will need to be re-processed later.

The address information entered on this screen is considered to be the mailing address location. (The unit's location is captured during the issuance process.) If during the quoting process the insured's address is amended or the Social Security number is added, the system will automatically re-pull the insurance score.

**NOTE: On corporately titled risks an insurance score will be obtained based on designee information.**

## Owner Personal Screen

Markel American Insurance Company - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://corpwebuat30:8083/express30/default.aspx> Go

Marketing Owner Personal Unit Operator Operator Assignment Coverage Rating Worksheet

\* indicates a required field

Add Owner

First Name Middle Initial Last Name Suffix (Select) Date of Birth SSN

Spouse is a Titled Owner ☐

Mailing ZIP Mailing Address 1 Mailing Address 2 City/County (select) Mailing State

Validate Address

Primary Phone Secondary Phone E-Mail Address Customer Reference Info

Address provided is same as residence street address ☐

Change Ownership Type

Previous Next

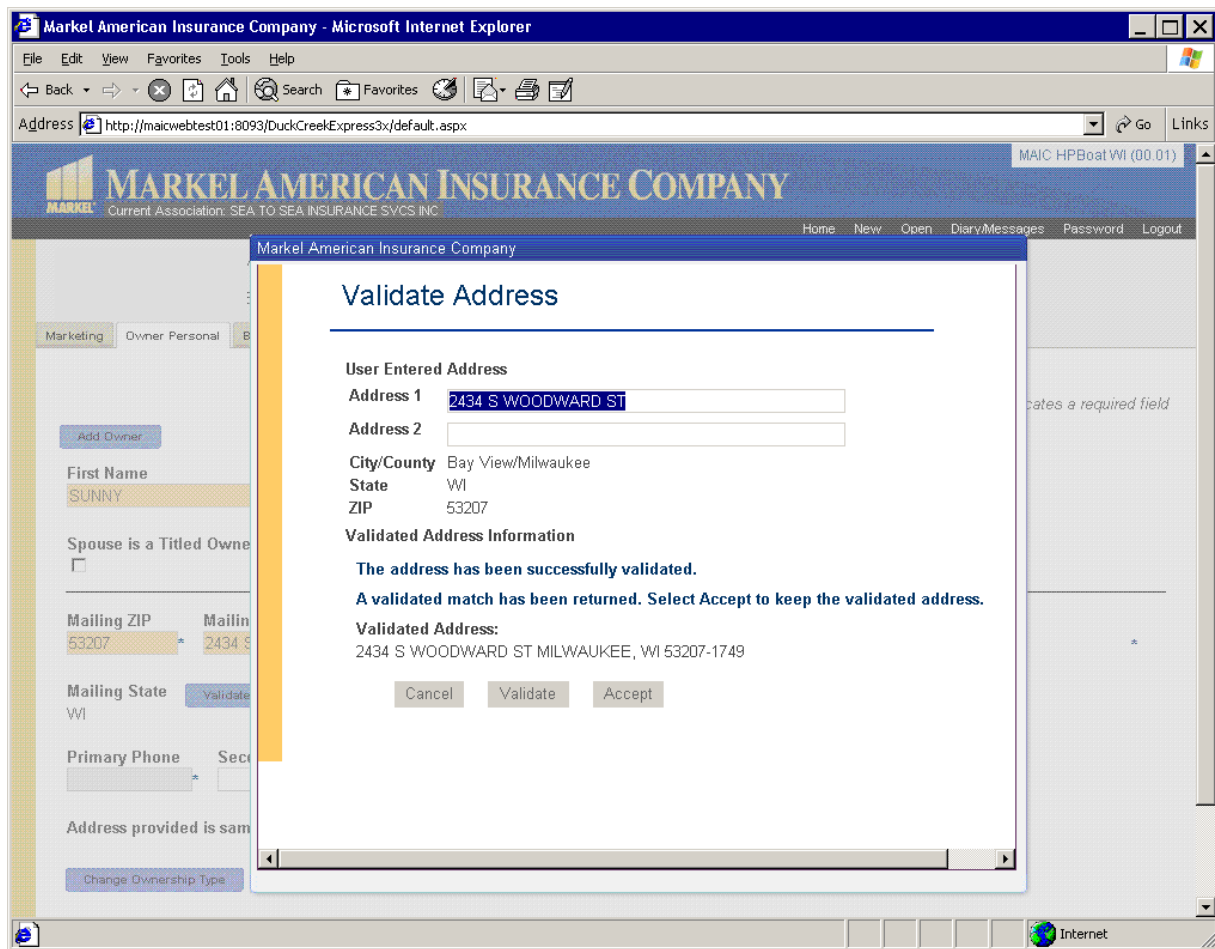
Done Local intranet

### Spouse is a Titled Owner:

This checkbox will force the appearance of fields to capture the name of the spouse if spouse is also a registered owner of the unit. Their name will appear on the 2<sup>nd</sup> line of the Insured Name and Address area on any applicable forms output.

### Validate Address:

This button brings up the Address Validation screen. It automatically validates the address that you entered on the screen previous against a USPS database, however, you can enter in a different address if you'd like.



### Change Ownership Type:

Click this button to switch between Personal Owner Screen and Corporate Owner Screens.

### Customer Reference Info:

This field can be used at the discretion of the agent but if used, will print on the Declarations Page in a designated area.

### Mail Address same as Residence Address Checkbox:

If this checkbox is checked, it will bring the mailing address information into the Unit screen as the risk location address.

### Owner Corporate/Trust Screen

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#

File Edit View Favorites Tools Help

Markel American Insurance Company

MARKEL AMERICAN INSURANCE COMPANY  
Current Association: AMERICAN UNDERWRITING MGRS AGCY INC

Home New Open Diary/Messages Password Logout

SUSAN BROWN, BROWN FAMILY TRUST (Quote - New-Pending)  
QT00000059158 - Property\_MobileHome  
AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY

Marketing Owner Corporate/Trust Unit Underwriting Coverage Save and Exit

\* indicates a required field

Corporate/Trust Name Designee First Name Designee Last Name Designee Date of Birth Designee SSN  
BROWN FAMILY TRUST SUSAN BROWN 3/14/1955

Designee ZIP Designee Address 1 Designee Address 2 Designee City/County Designee State  
40202 5423 SUNSET DRIVE Louisville/Jefferson KY Validate Address

Primary Phone Secondary Phone Fax Number E-Mail Address Customer Reference Info

Policy Mailing Address is same as Designee Address ☐

Policy Mailing ZIP Policy Mailing Address 1 Policy Mailing Address 2 Policy Mailing City/County Policy Mailing State  
40202 100 MAIN ST Louisville/Jefferson KY

Change Ownership Type

Previous Next

Local intranet 100%

Corporate/Trust Name should be entered along with the designee's name and address information. All functions of the screen are identical to the [Personal Owner Screen](#).

### Mail Address same as Designee Address Checkbox:

If Corporate Owner, it indicates that the corporate mailing address is the same as the Corporate designee's mailing address.

### Previous:

Clicking this button will take you back to the [Marketing Screen](#).

### Next:

Clicking this button will take you back to the [Unit Screen](#).

## UNIT SCREEN

In lieu of commenting on each field entered on the [Unit Screen](#), only those fields that require special attention will be noted below. The screen shot that follows will provide a complete view of the [Unit Screen](#). If unit is part of a Rental policy with multiple units, then a Rental Schedule will show which will allow you to access the [Unit Screen](#) detail individually for each policy

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#

File Edit View Favorites Tools Help

Markel American Insurance Company

SUSAN BROWN, BROWN FAMILY TRUST (Quote - New-Pending)  
QT00000059158 - Property\_MobileHome  
AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY

Marketing Owner Corporate/Trust **Unit** Underwriting Coverage Save and Exit

\* indicates a required field

Location ZIP: 40202 Location Address 1: 100 MAIN ST Location Address 2: City/County: Louisville/Jefferson Location State: KY Territory: 1 Usage: Owner Municipality Override: Municipality: Louisville Year: Manufacturer: Unit Width: Double Purchase Price: Purchase Date (MM/YYYY): Value: Protection Class: 1-6 Serial Number: Has Additional Interest on Policy?: None Swimming Pool: None Supplemental Heating: None Is home tied down? Yes No

Previous Next

### Location Address Info:

This is the location address of the where the unit is kept and must be in the same state as the zip code that was entered on the New Quote screen.

### Municipality Override Checkbox (Kentucky risks only):

Checking this box will allow you to override the municipal taxes but you must furnish proof that the applicant pays taxes to an untaxed municipality before this feature can be used.

### Additional Interest on Policy Question:

This is where existence of a Loss Payee or Additional Insured is noted. Changing value from None to another choice will force entity information to be collected during issuance process.



## UNIT SCREEN – SCHEDULE PRESENTATION FOR RENTAL USAGE

If policy is Rental Usage, you will receive an “Add Unit” button on the unit screen after the initial unit has been created. You can continue to add units and the top tab will be displayed as Risk Sched Detail:

The screenshot shows a web browser window titled "Markel American Insurance Company - Windows Internet Explorer". The address bar shows a URL starting with "http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#". The page header includes the Markel American Insurance Company logo and navigation links: Home, New, Open, Diary/Messages, Password, Logout. A user profile "MAIC MobileHome KY (00.00.02)" is visible in the top right corner.

The main content area is titled "Risk Sched Detail". It contains a form for adding or editing a unit. The form includes the following fields and options:

- Location ZIP:** 40201
- Location Address 1:** 300 MAIN ST
- Location Address 2:** (empty)
- City/County:** Louisville/Jefferson
- Location State:** KY
- Territory:** (empty)
- Usage:** Rental
- Municipality Override:** ☐
- Municipality:** (empty)
- Year:** 1999
- Manufacturer:** (empty)
- Unit Width:** Double
- Purchase Price:** 20000
- Purchase Date (MM/YYYY):** 02/2007
- Value:** 18000
- Protection Class:** 1-6
- Serial Number:** (empty)
- Has Additional Interest on Policy?:** None
- Swimming Pool:** None
- Supplemental Heating:** None
- Is home tied down?:** Yes (selected), No

At the bottom of the form, there are three buttons: "Coverage Detail", "Delete", and "OK".

**Note:** It is helpful to add the Location Address for each unit so that it is easy to distinguish each unit on the [Unit Screen](#).

Fields are the same as the previous [Unit Screen](#) with the exception of the following additional buttons:

### Coverage Detail Button:

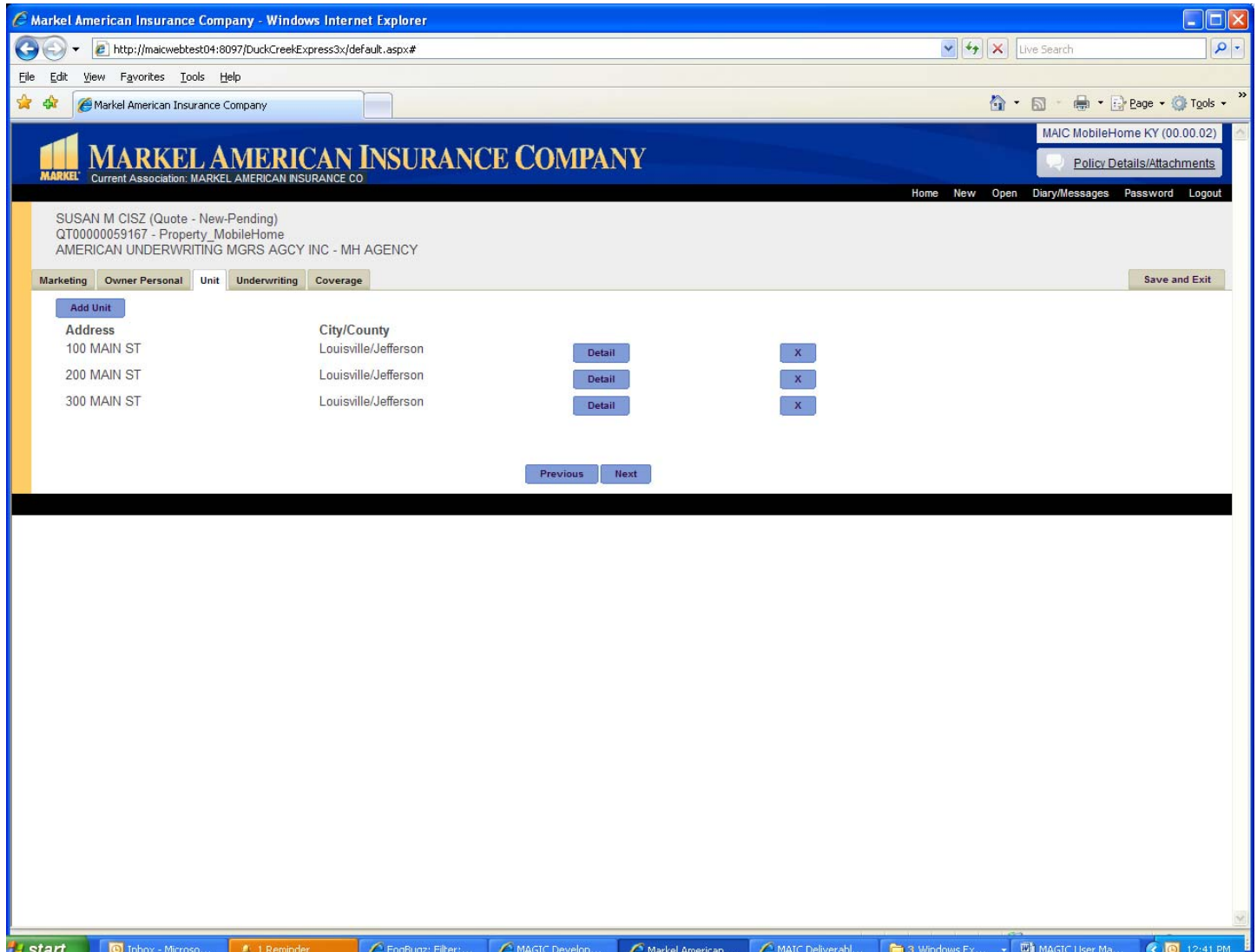
Clicking on this button while on a specific Unit Screen will take you directly to the [Coverage Screen](#) for that unit however this button will not appear until after you answered the Underwriting Questions found on the next screen in the Quote process.



### Delete Unit Button:

If more than one unit is entered, a “Delete” button will appear at the bottom of the screen. Clicking “Delete” will delete the current page’s unit information. The delete function is not enabled if there is only one unit listed on the quote.

Once all unit information has been entered click “OK” to proceed back to the [Unit Screen](#) which will now present in a Schedule format.



The screenshot shows the Markel American Insurance Company web application. The header includes the company logo and navigation links. The main content area displays a quote for SUSAN M CISZ (Quote - New-Pending) with address information. Below this, there is a table with three units, each with an 'Add Unit' button and a 'Detail' button. The 'Detail' button is circled in red. The table has columns for Address, City/County, and a 'Detail' button. The units are listed as follows:

Address	City/County	Detail
100 MAIN ST	Louisville/Jefferson	<a href="#">Detail</a>
200 MAIN ST	Louisville/Jefferson	<a href="#">Detail</a>
300 MAIN ST	Louisville/Jefferson	<a href="#">Detail</a>

### Add Unit Button:

If there is more than 1 unit to be quoted, upon completing the [Unit Screen](#) for the first unit, click on “Add Unit” at the top of the left-hand corner of your screen. This will bring up a blank unit screen where the 2<sup>nd</sup> unit’s information should be entered. The “Add Unit” function can be used an infinite number of times.

If at any time you need to revert to the previous unit’s information, click on “Previous Unit” (as shown below, circled in red).

### Detail Button:

Clicking on this button for a specific unit will take you to the Unit Detail screen for that unit.

### “X” Button:

Clicking on the “X” button will delete that unit from the Unit Schedule page. The delete function is not enabled if there is only one unit listed on the quote.

Once all unit information has been entered click “Next” to proceed to the [Underwriting Screen](#).

## UNDERWRITING SCREEN

The screen shot that follows provides a complete view of the [Underwriting Screen](#).

The screenshot shows the Markel American Insurance Company website in a Windows Internet Explorer browser. The address bar displays the URL: <http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#>. The page header includes the Markel logo, the company name "MARKEL AMERICAN INSURANCE COMPANY", and the current association "TRANSWESTERN GENERAL AGENCY". A navigation bar at the top right contains links for "Home", "New", "Open", "Diary/Messages", "Password", and "Logout". The main content area is titled "(Quote - New-Pending) - Property\_MobileHome" and "TRANSWESTERN GENERAL AGENCY - ACTION INSURANCE INC". Below the title, there are tabs for "Marketing", "Owner Personal", "Unit", "Underwriting", and "Coverage". The "Underwriting" tab is currently selected. The form contains a series of underwriting questions, each with "No" and "Yes" radio button options. A note at the bottom right of the form states: "\* indicates a required field". The questions include: "Has the applicant had any losses in the last five years?", "Has applicant been convicted of fraud, arson or other insurance related offense?", "Has the applicant had a foreclosure or repossession in the last 4 years?", "Is the applicant more than 60 days past due in mortgage payments?", "Is applicant unemployed, other than retired or disabled?", "Is the primary heat source thermostatically controlled?", "Are kerosene or other portable space heaters used?", "Does the unit have utility services?", "Is the unit easily accessible from public roadways?", "Is the unit located on a site with prior flooding, landslides or brush fires?", "Does the unit have unrepaired damage?", "Is the unit in the process of renovation?", "Does the unit have working smoke detectors?", "Does the unit have more than two loss payees?", "Has applicant been cancelled or non-renewed for underwriting reasons in the last 4 years?", "If not a new purchase, has the unit been uninsured for more than 30 days?", "Has the applicant filed bankruptcy within the last 4 years?", "Does the applicant have any animals with a bite history or an Akita, Chow, Pit Bull, Doberman, Rottweiler, or any non-domestic animal?", "Is business conducted on the premises?", "Do all steps, porches & decks that are 3' or more off the ground have secure rails?", and "Is there a trampoline on premises?". The bottom of the screen shows the Windows taskbar with the Start button and several open applications: "Inbox - Microsoft Out...", "Home - MAGIC - Prop...", "MAGIC Development ...", "Markel American Insu...", "Property", "MAGIC User Manual-...", and a clock showing 11:21 AM.

### Underwriting Questions:

All Underwriting Questions must be answered and any messages due to eligibility will be presented at the top of the next page.

If the applicant has prior losses (see question #1), a new tab will display called 'Loss History', with required information on loss detail.

Once all Underwriting Questions have been entered, click “Next” to proceed to the [Coverage Screen](#).

## COVERAGE SCREEN

The following screen shots provide a complete view of the [Coverage Screen](#).

Any adjustments to coverage limits, terms or deductibles will automatically force the system to rerate the policy.

Market American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#

File Edit View Favorites Tools Help

Market American Insurance Company

QT00000059158 - Property MobileHome  
AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY

Marketing Owner Corporate/Trust Unit Underwriting Coverage Submission Rating Worksheet Save and Exit

Financial Responsibility Level Z

The owner information entered resulted in a NO HIT. Please verify the information and correct if necessary.

Annual Premium:	Unit Fees/Taxes:	Policy Fees/Taxes:	Total Annual Premium:
\$327.00	\$16.35	\$4.91	\$348.26

Description 2005 Double Usage: Owner

Coverage	Limit	AOP Ded %	AOP Ded \$	Wind/Hail Ded \$	Premium
Standard Package	<input checked="" type="checkbox"/>				
No Dwelling Coverage	<input type="checkbox"/>				
Cov A - Manufactured Home	15000	1.0%	\$500	N/A	\$236
Cov B - Other Structures	1500				\$6
Settlement Type Cov A/B	ACV				
Cov C - Personal Property	7500				\$57
Settlement Type Cov C	ACV				
Cov D - ALE	3000				Incl
No Liability Coverage	<input type="checkbox"/>				
Cov E - Liability	\$50,000				\$23
Cov F - Med Pay	\$500				\$5
Cov G - Damage to Property of Others	\$500				incl.

Done Local intranet 100%

Market American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3/default.aspx#

File Edit View Favorites Tools Help

Market American Insurance Company

Cov D - ALE	3000	Incl
No Liability Coverage	<input type="checkbox"/>	
Cov E - Liability	\$50,000	\$23
Cov F - Med Pay	\$500	\$5
Cov G - Damage to Property of Others	\$500	incl.

**Additional Coverages**

Earthquake	<input type="checkbox"/>	No Coverage	\$0
Flood	<input type="checkbox"/>	No Coverage	\$0
Equipment Breakdown		No Coverage	\$0
Golf Cart	None	No Coverage	\$0
Identity Fraud	No Coverage		\$0

Scheduled Personal Property [Add/Edit SPP](#)

**Endorsements**

Total Endorsement Premium	
Unit Premium	\$327

[Endorsements](#)

[Previous](#) [Next](#)

Done Local intranet 100%

### Rating and Referral Messages:

Eligibility and referral messages, will appear at the top of this page. If a risks is ineligible, a rate will not be delivered. If data was entered incorrectly, once corrected, a rate will be provided.

### Term Premium:

The total term premium, not including any taxes.

### Unit Fees/Taxes:

Any taxes/fees that apply to each unit.

### Policy Taxes/Fees:

Any applicable taxes/fees that apply to the policy.

### Total Term Premium:

The total term premium including any applicable taxes/fees.

### Coverage List:

Lists all applicable coverages along with the limit, deductible and premium for each unit.

**Unit Premium:**

The total premium for all of the coverages (not including any applicable taxes)

Once all Coverages, Limits and Deductibles have been selected, click “Next” to proceed to the [Submission Screen](#).

**Coverage Selection:**

Standard Package – An owner occupied risk will default to a standard package. The package coverage and limits can easily be changed by un-checking the “Standard Package” checkbox.

No Dwelling Coverage – If your applicant is interested in liability only coverage, checking the “No Dwelling Coverage” box will remove all property coverage.

No Liability Coverage - If your applicant is interested in property only coverage, checking the “No Liability Coverage” box will remove all liability coverage.

## SUBMISSION SCREEN

At this point, if all information necessary to provide a rate has been entered and there are no outstanding rating messages, the Submission tab should display. If no Submission tab displays, that will indicate that there is missing information on one of the previous pages or rating errors have not been handled. Those page tabs will display with a red line on top of the tab name. Once errors or omissions have been handled, the [Submission Screen](#) will appear.

Once on the [Submission Screen](#), you can click on Save and Exit (which saves the quote for later), Prepare Quote sheet, Complete the Quote, Refer it, or go back to make any desired changes.

The screenshot shows the Markel American Insurance Company website in a Windows Internet Explorer browser. The address bar shows the URL: http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#. The page title is "Markel American Insurance Company". The main header features the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY" with the tagline "Current Association: AMERICAN UNDERWRITING MGRS AGCY INC". A navigation bar includes links for Home, New, Open, Diary/Messages, Password, and Logout. The main content area displays the quote details for "SUSAN BROWN, BROWN FAMILY TRUST (Quote - New-Pending)". The quote number is "QT00000059158 - Property\_MobileHome" and the agency is "AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY". The "Submission" tab is selected, showing fields for Name, Previous Policy Number, and Usage. The "Premiums" section shows a table with columns for Total Annual Premium, Total Written, Prior Total Annual, and Written Change. The "Billing Instructions" section has a dropdown menu set to "Bill Insured". The "Billing Information" section includes fields for Name, ZIP, Address 1, Address 2, City/County, State, and Email. The "Available Actions" section contains buttons for "Prepare Quote Sheet", "Refer", and "Complete Quote". At the bottom, there are "Previous" and "Next" buttons. The status bar at the bottom of the browser shows "Done" and "Local intranet".

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#

File Edit View Favorites Tools Help

Markel American Insurance Company

MAIC MobileHome KY (00.00.02)

Policy Details/Attachments

Home New Open Diary/Messages Password Logout

SUSAN BROWN, BROWN FAMILY TRUST (Quote - New-Pending)  
QT00000059158 - Property\_MobileHome  
AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY

Marketing Owner Corporate/Trust Unit Underwriting Coverage Submission Rating Worksheet

Name: SUSAN BROWN, BROWN FAMILY TRUST

Previous Policy Number: N/A Usage: Owner Occupied

Premiums

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$348.26	\$348.26	\$0.00	\$348.26

Billing Instructions

Bill Insured

Billing Information

Name  
ZIP  
Address 1  
Address 2  
City/County  
State  
Email

Available Actions

Prepare Quote Sheet Refer Complete Quote

Previous Next

### Save and Exit:

If the quote is done being processed and no further action is required at that time, click "Save and Exit". The quote can then be retrieved to work on again at a different time. **If you do close the browser without hitting Save and Exit the quote will be locked and another user in your office will not be able to access to make any changes.**

### Billing Instructions

Select the appropriate choice from the drop down menu. Choices are "Bill Insured", "Bill Other" and "Bill Loss Payee", if a loss payee has been added to the policy. If the invoice is to go to

someone other than the insured or loss payee, select “Bill Other”. Fields will then display asking you for alternative billing address information.

### Prepare Quote Sheet and Application:

Clicking “Print” will prepare the quote sheet and application as a PDF file that can be printed and emailed. The quote sheet will contain all of the pertinent notices and disclosures. The PDF becomes part of the quote and will be found in the Diary/Attachment section.

Upon clicking print, a box will appear that allows you to enter notes that will print on the quote sheet. If you wish to enter notes, do so, and then click “Print”.

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx:#

File Edit View Favorites Tools Help

Markel American Insurance Company

MAIC MobileHome KY (00.00.02)

Policy Details/Attachments

Home New Open Diary/Messages Password Logout

Online Print

Remarks

PRINT

Return to Policy Print

Documents have been created in a .PDF format and have been attached to this quote for your convenience. To view the documents go to "Policy Details/Attachments".

Local intranet 100%

**Note:** It is advisable to always use the print feature to print a quote, in lieu of just printing the page from your web browser. The PDF file that is generated contains important notices and disclosures that need to be shared with the applicant along with the required application.

### Refer:

If the quote is processed but requires approval before issuance, click the “Refer” button. It’s important to enter notes to let the underwriter know why you think the risk should be approved as submitted.

The “Refer” button will always display, even when a referral is not required. Please pay attention to the rating messages to confirm whether a referral is required or not. You may also refer at any time that you would simply like a second opinion on a risk.

***For more information on referrals review the section that follows regarding Referring a Risk for Approval.***



### **Complete Quote:**

If you have authority and are ready to Issue this quote, click the **Complete Quote** button which will begin the Issuance Process.

## ISSUING A POLICY

### **ISSUANCE PROCESS – TURNING YOUR QUOTE INTO AN ISSUED POLICY**

Once you've clicked the **Complete Quote** button, you will be taken back through the Quote process to the Owner, Unit and Operator screens to complete any fields highlighted in blue. These are fields that must be completed before policy can be issued. The Complete Quote button also created a new screen, called the Policy Information screen, which will now display as the 1<sup>st</sup> screen tab, directly in front of the Owner Screen. See next section for screen details.

The following screens will need to be reviewed and any necessary data entry completed before policy can be issued:

#### **OWNER SCREEN:**

##### **Mailing Address:**

Verify that the mailing address is correct to ensure insured's receipt of all policy documents.

##### **Primary Phone:**

The phone number including the area code

#### **UNIT SCREEN:**

##### **Location Address 1:**

The street address of where the unit is kept

##### **Manufacturer:**

The manufacturer of the Unit to be insured

##### **Serial Number of Unit:**

The Serial number of the Unit to be insured

#### **ADDITIONAL INTEREST SCREEN:**

All Additional Interests, if applicable, must be added before Issuance.

If you are ready to Issue this quote, you will 'Click' back to the [Submission Screen](#).

#### **Please Note:**

During the Complete quote process, the Marketing Screen now disappears from your quote and is replaced by the Policy Information Screen as described below. Any necessary adjustments should be made before the policy is issued.



## POLICY INFORMATION SCREEN

This is a new screen that was created during the Complete Quote process. It will be a permanent screen from this point on and will also be used and viewable after the quote has become a policy. It will contain many items from the Marketing Screen as this screen no longer exists after the Complete Quote process.

The screenshot shows a web browser window titled "Markel American Insurance Company - Windows Internet Explorer". The address bar shows a URL starting with "http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page content is for a quote for SUSAN BROWN (Quote - New-Pending), with policy number QT00000059158 - Property\_MobileHome, underwritten by AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY. The "Policy Information" tab is selected, with other tabs like Owner Personal, Unit, Underwriting, Coverage, Submission, and Rating Worksheet. A "Save and Exit" button is in the top right. The form includes fields for Usage (Owner Occupied), Term (12 Months), Effective Date (11/04/2009), and Expiration Date (11/04/2010). A "Renewal of current Markel American policy?" dropdown is set to "No". A section for "Current GA/Subproducer" shows 90199 - AMERICAN UNDERWRITING MGRS AGCY INC and 1234123 - MH AGENCY. Below this is an "Assign New:" section with a "GA Number/Name" dropdown (set to "(select)"), a "Producer Number/Name" dropdown (set to "(select)"), and a "Find Producer" button. At the bottom, there are checkboxes for "MAIC Approved Book Roll" and "Opt out of marketing materials", and a "Next" button. The browser's status bar at the bottom shows "Local intranet" and "100%" zoom.

### Renewal of Markel Policy:

If during the Complete Quote process you realized that you forgot to indicate that this was a Markel renewal or reissue, you will be able to indicate this here before Issuance. If changed to either choice you will be prompted to enter the previous Paragon policy number.

### Agent Name and Number:

If during the Complete Quote process you realized that you assigned your quote to the wrong subproducer, you will be able to change the agent here before Issuance. Selection process is identical to that on the [New Quote screen](#).

### MAIC Approved Book Roll:

If during the Complete Quote process you realize that you did not mark this policy as part of an approved Book Roll, you will be able to indicate this before Issuance. **Note: This field cannot be utilized without permission from the Markel**


## Current Insurer:

If during the Complete Quote process you realized that you indicated the incorrect current carrier, you will be able to change the company name here before Issuance.

## ADDITIONAL INTEREST SCREEN

If during the quote process you indicated on the Unit screen that you had a Loss Payee or an Additional Insured, this screen tab will be created during the Complete Quote process and you will be required to add the Loss Payee or Additional Interest to each unit before the policy can be issued. If endorsing the policy to add a Loss Payee or Additional Insured, it must be completed on this screen. Unit must have physical damage coverage in order to add a Loss Payee.

The screenshot displays the Markel American Insurance Company web application in a Windows Internet Explorer browser. The address bar shows the URL: <http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx#>. The page header includes the Markel logo and the text "MARKEL AMERICAN INSURANCE COMPANY" with "Current Association: AMERICAN UNDERWRITING MGRS AGCY INC". A navigation bar at the top right contains links: Home, New, Open, Diary/Messages, Password, and Logout. The main content area shows a quote for "SUSAN BROWN (Quote - New-Pending)" with policy number "QT00000059158 - Property\_MobileHome" and agency "AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY". Below this, a tabbed interface is visible with tabs: Policy Information, Owner Personal, Unit, Underwriting, Additional Interest (selected), Coverage, Submission, and Rating Worksheet. The "Additional Interest" tab is active, showing a "Description:" field with the text "100 MAIN ST Louisville, 40202". Below the description, there are two dropdown menus, both currently set to "(Select)". To the right of these dropdowns is an "Add" button. Below the dropdowns, the options "Loss Payee" and "Additional Insured" are listed. At the bottom of the tab, there are "Previous" and "Next" buttons. The status bar at the bottom of the browser window indicates "Local intranet" and "100%" zoom.


**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: Statewide General Agency

MAIC MobileHome OK (00.00.02)  
[Policy Details/Attachments](#)

[Home](#)
[New](#)
[Open](#)
[Diary/Messages](#)
[Password](#)
[Logout](#)

TEST QUOTE (Quote - New-Pending)  
QT00000059318 - Property\_MobileHome  
STATEWIDE GENERAL AGENCY INC - Statewide General Agency

Marketing
Owner Personal
Unit
Underwriting
Additional Interest
Coverage
Submission
Rating Worksheet
Save and Exit

Description:  
121 MAIN Tulsa, 74101

Loss Payee
Add

Loss Payee

Name
ZIP
Address 1
Address 2
City/County
State

Delete
Validate Address
Copy
Paste

Previous
Next

### Add:

Clicking this button will bring up fields for entering in the Loss Payee's information for each unit. All fields in blue must be filled out to issue the quote.

### Validate Address:

Validate Address works the same as on the [Owner Screen](#).

### Copy and Paste:

If the Loss Payee or Additional Insured is the same for multiple Rental units, use the copy and paste button to enter the information more quickly.

## SUBMISSION SCREEN

Once all information necessary for Issuance has been entered during the Complete Quote process, the [Submission Screen](#) is your final stop.

The action you are able to take at this time is based on your authority as well as if the risk is approved for issuance.

If you have received a rating message that advises that the risk must be referred, at this time you will refer the policy by clicking the “Refer” button or click “Exit”. (See instructions that follow regarding referrals)

If the Policy is ready to issue, click the “Complete Issuance” button shown below. The system will force you to enter an Effective Date, allow you to Add Notes and change your Billing Instructions.

The effective date of the policy cannot be less than 5 days or more than 30 days from today’s date.

The screenshot shows a web browser window titled "Markel American Insurance Company - Windows Internet Explorer". The address bar shows a URL starting with "http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx:#". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page content is for a policy with ID QT00000059158, titled "Property\_MobileHome" and "AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY". The "Submission" tab is active, showing fields for Name (SUSAN BROWN), Previous Policy Number (N/A), Usage (Owner Occupied), and Effective Date (11/4/2009). Below this is a "Premiums" section with a table showing Total Annual Premium (\$348.26), Total Written (\$348.26), Prior Total Annual (\$0.00), and Written Change (\$348.26). An "Issue Notes" section has a "Remarks" label and a text area. The "Billing Instructions" section shows a dropdown menu set to "Bill Insured". The "Billing Information" section lists personal details: Name (SUSAN BROWN), ZIP (40202), Address 1 (100 MAIN ST), Address 2, City/County (Louisville/Jefferson), State (KY), and Email. At the bottom, the "Available Actions" section contains three buttons: "Prepare Quote Sheet", "Refer", and "Complete Issuance". The browser's status bar at the bottom indicates "Local intranet" and "100%" zoom.

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx:#

File Edit View Favorites Tools Help

Markel American Insurance Company

QT00000059158 - Property\_MobileHome  
AMERICAN UNDERWRITING MGRS AGCY INC - MH AGENCY

Policy Information Owner Personal Unit Underwriting Coverage Submission Rating Worksheet Save and Exit

Name: SUSAN BROWN

Previous Policy Number: N/A Usage: Owner Occupied

Effective Date: 11/4/2009 \*

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$348.26	\$348.26	\$0.00	\$348.26

**Issue Notes**

Remarks

**Billing Instructions**

Bill Insured

**Billing Information**

Name: SUSAN BROWN  
ZIP: 40202  
Address 1: 100 MAIN ST  
Address 2:  
City/County: Louisville/Jefferson  
State: KY  
Email:

**Available Actions**

Prepare Quote Sheet Refer Complete Issuance

### Complete Issuance:

When you Click the [Complete Issuance](#) button, the system will load the Payment Information for this policy and will direct you to the [Payment Information Screen](#).

## PAYMENT INFORMATION SCREEN

At the top of the payment box, the total policy premium and policy term is displayed as well as the coverage start date.

1. Click on “View Payment Schedules” to view what installment plans are available based on that premium amount.
2. Pick the chosen Payment plan from the drop down box.
3. Choose the Payment Type. If paying by credit card or debit card, you will select the Credit Card option in the drop down box. If paying by any other method, you will select the “Mail Invoice” option in the drop down box. (See below for Credit Card processing.)

Markel American Insurance Company

### Payment Information

#### Policy Information

Full Annual Premium	Policy Term	Coverage Start Date	
\$1,205.00	12 Months	11/09/2009	<a href="#">View Payment Schedules</a>

Expiration Date: 11/09/2010

#### Payment

Payment Plan: Two Installments

Payment Type: Mail Invoice - Payment due in 21 days

[Cancel](#) [Complete Issuance](#)

### OTHER THAN CREDIT OR DEBIT CARD

1. Once you have selected the “Payment Plan” and “Mail Invoice – Payment due in 21 days” option, click “Complete Issuance” to finish issuing the policy or “Cancel” to discontinue issuing the policy.
2. An [Issue Confirmation Screen](#) will appear advising that the policy has been issued and that output will be mailed out the next business day. (see below) The assigned policy number will be visible in the upper left-hand corner of the orange summary box.

## Issue Confirmation Screen

**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: Statewide General Agency

MAIC MobileHome OK (00.00.02)  
[Policy Details/Attachments](#)

[Home](#) [New](#) [Open](#) [Diary/Messages](#) [Password](#) [Logout](#)

Thank you for your business!  
Policy output will be mailed on the next business day.  
Please call our office if you have any questions.

[Proceed to Policy Admin](#)

<b>Policy Number:</b> MMH00000070165	<b>Premium Written:</b> \$1,205.00	<b>Effective Date:</b> 11/09/2009	<b>Risk State:</b> OK
<b>Status:</b> In Force	<b>Payment Plan:</b> Two Installments	<b>Expiration Date:</b> 11/09/2010	<b>Rate Effective Date:</b> 11/09/2009
<b>Line of Business:</b> Property_MobileHome	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b>	<b>Last Modified Date:</b> 11/09/2009
<b>Term:</b> 12 Months		<b>Grace Equity Date:</b>	

**Insured:**  
TEST QUOTE  
121 MAIN  
Tulsa, OK 74101  
262-548-9880

**Producer:**  
10302 - 000001

**Agency:**  
40300

**Unit:**  
2004 TRAILER Double

4. As soon as output is available, it may be printed in your office.
5. At this point, you may exit the policy by starting a new transaction, or proceed to Policy Administration.

### Paying by Credit Card:

1. Select Credit Card as the Payment type.
2. Select Payment Plan
3. If the cardholder is the same as the insured, click 'Yes'. The fields will populate with the applicant's mailing address information.
4. If the cardholder is not the same as the insured, click 'No' and enter in all required information.
5. Complete the Credit Card Information section.
6. Once complete, click [Complete Issuance](#) button.

**NOTE:** **Do not** click on the button more than once or you risk the credit card being charged multiple times.

7. Once the payment has been processed through the Credit Card company, the [Issue Confirmation Screen](#) will appear as indicated in payment section above.

## Payment Information

\* indicates a required field

### Policy Information

Full Annual Premium \$55.00    Policy Term 12 Months    Coverage Start Date 11/09/2009

[View Payment Schedules](#)

Expiration Date: 11/09/2010

### Payment

Payment Plan: Full Pay \*

Payment Type: Credit Card \*

Amount \$55.00 \*    Minimum Payment Amount \$55.00

Is Cardholder same as Insured?    ☐ Yes ☒ No

### Cardholder Information

Name \*

Address \*

City \*    Zip Code \*    State (select) \*

Credit Card Type --Select a Credit Card-- \*    Credit Card # \*    Security Code \*

Expiration Date (Select) \* / (Select) \*

Please Enter a Valid Credit Card Number.

When you click on the Complete Issuance button, credit card payment will be processed.  
Do not click on the button more than once or you risk the credit card being charged multiple times.  
Please wait for the confirmation page which will display when the policy has been issued.

[Cancel](#)
[Complete Issuance](#)

## Paying by Check

1. On the Issuance Confirmation Screen, select Proceed to Policy Admin. This will take you to the TransAct screen.
2. Click on "Apply Payment button". This will take you to our billing system to apply your payment. The Billmatrix screen will display the policy number, current due, total balance due, payments received and the installment schedule.





[en Español](#)

## Select Payment Type



You may make payments with an electronic check, ATM Debit card with a PULSE, STAR or ACCEL logo or Visa, MasterCard, Discover or check card. Billmatrix does not accept Money Orders or Cashiers Checks. Enter the amount you wish to pay and select the payment type.

Policy Number

Current Due

\$0.00

Total Balance Due

\$611.00

Payments Received	
Date	Amount

Installment Schedule		
Due Date	Amount	Installment Fee
12/09/2009	\$ 303.00	\$5.00
01/06/2010	\$ 303.00	\$0.00

Payment Amount

\$

Select Payment Type

[Continue >>](#)

The information you submit is secure. [Click here to verify.](#)

3. Enter the payment amount.
4. Select Electronic Check from the drop down box and click Continue.



## Enter Check Information

Enter the check routing number and account number from the Magnetic Ink Character Recognition (MICR) line at the bottom of your check. When you are finished, click the Continue button to review your payment information.

Last Name or Commercial Name  
on Account

*Use only letters in the Name on  
Account fields.*

First Name on Account

Check Routing Number

[Need help locating this information?](#)

Account Number

[<< Back](#)

[Continue >>](#)

For assistance entering check information, please call Billmatrix Customer Care at 1-866-657-0187.

powered by  
**billmatrix**

5. Enter all required information on the [Check Information Screen](#) and click Continue.
6. Verify all the information you entered is correct and click Authorize to continue or back to return to the prior screen.
7. Once the payment has been processed through Billmatrix you will receive Payment Receipt. You can either Make Another Payment or Exit the Billmatrix system. Your payment will automatically apply to the policy.

## REFERRING FOR APPROVAL

Any time a quote or other transaction is outside a user's authority, it must be referred for approval. For efficiency, referral submissions should be made via the MAGIC system messaging capability.

If the risk is outside of your authority a quote indication will be provided. The system will alert you that approval is required. Quotes may be released as an indication without being submitted to the company. When releasing an indication to an applicant, please be sure to notify them that coverage and premium is subject to company review and approval.

Any risk requiring referral will follow an established hierarchy. For instance, a risk entered by a sub-producer will be referred to the General Agent. If the General Agent does not have the authority to approve the risk, the General Agent will refer the risk to MAIC. Once approved, the risk will follow the chain back down to the sub-producer.

The screenshot displays the 'Rating Worksheet' tab in the MAGIC system. At the top, there is a navigation bar with tabs: Policy Information, Owner Personal, Unit, Underwriting, Coverage, Submission, Rating Worksheet, and a Save and Exit button. Below the navigation bar, the form contains the following sections:

- Name:** O H MILLER
- Previous Policy Number:** N/A
- Usage:** Owner Occupied
- Effective Date:** 11/9/2009
- Premiums:**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$55.00	\$55.00	\$0.00	\$55.00
- Issue Notes:**

Remarks

PHOTOS REC
- Billing Instructions:**

Bill Insured
- Billing Information:**

Name  
ZIP  
Address 1  
Address 2  
City/County  
State  
Email
- Available Actions:**

Prepare Quote Sheet **Refer** Complete Issuance

At the bottom of the form, there are 'Previous' and 'Next' buttons.

For example, you quote a risk that requested \$300,000 liability limits. Your agency does not have authority to issue the policy so it needs to be referred to MAIC for approval. On the [Submission Screen](#), on the lower left-hand side is a "Refer" button. By clicking this button, you have initiated the referral process.

1. A dialog box will appear that allows you to include a message with your referral.

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx?SLT=Skins/Markel#

File Edit View Favorites Tools Help

Markel American Insurance Company

Policy Information Owner Personal Unit Underwriting Coverage Submission Rating Worksheet

Name: DIANE DORN

Previous Policy Number: N/A Usage: Owner Occupied

Effective Date: 11/04/2009

Premiums

Total Annual Premium: \$415.35 Total Written: \$415.35 Prior Total Annual: \$0.00 Written Change: \$415.35

Issue Notes

Remarks

Billing Instructions

Bill Insured

Billing Information

Name: DIANE DORN  
 ZIP: 40201  
 Address 1: 1234 OAK ST  
 Address 2:  
 City/County: Louisville/Jefferson  
 State: KY  
 Email:

Available Actions

Prepare Quote Sheet Refer Complete Issuance

Previous Next

Local intranet 100%

2. If desired, enter a message and click "OK".

Given the scenario outlined above, this quote will be referred to MAIC.

**Note: Once the referral is sent, the quote is read only and is unable to be modified by the original sender.**

3. The underwriter at MAIC will open the message to see why the risk was referred. They will then load the policy and view what has been entered.
4. A decision will then be made. The risk will either be *approved*, *declined*, or put into *pending* status awaiting additional information.
5. Once that decision is made, a message will be sent back to your Agency. (See the screen print that follows)

MARKEL AMERICAN INSURANCE COMPANY  
Current Association: MARKEL AMERICAN INSURANCE CO

Home New Open Diary/Messages Password Logout

Welcome, MC Level 2 Internal User

You have 2 new and 0 overdue message(s).

Messages				
<a href="#">?</a> <a href="#">Save Table Settings</a> <a href="#">Restore Defaults</a>				
12/3/2008, 5:31	kramsby	Approve	QT00000033090 has been approved on 2008-12-03 APPROVED	

If the risk is **approved**, the quote may be issued.

If the risk is **declined**, the underwriter will detail in the message why it was declined.

If the risk is **pending**, the message will advise what is needed prior to giving the approval or declination.

In the example above, this quote was approved. In the box outlined in red, note the Activity and the description—both indicating “Approve”.

6. If a Sub-Producer originally referred the risk to the General Agent they will receive the same message.

## POLICY DETAILS/ATTACHMENTS

At any time while in a quote or policy, documents may be attached or diary entries made by clicking on the “Policy Details/Attachments” Icon in the upper left-hand corner. (See red oval shown below.)

TransACT Master 2.10

MARKEL AMERICAN INSURANCE COMPANY

Current Association: MARKEL AMERICAN INSURANCE CO

HomeNewOpenDiary/MessagesPasswordLogout

Policy Details/Attachments

Trans ACT

View Service History

<b>Policy Number:</b> QT00000033090	<b>Written Premium:</b> \$79.00	<b>Effective Date:</b> 12/3/2008	<b>Risk State:</b> WI
<b>Status:</b> Quote	<b>Payment Plan:</b>	<b>Expiration Date:</b> 12/3/2009	<b>Rate Effective Date:</b> 12/3/2008
<b>Product:</b> RecVehicle_Motorcycle	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b>	<b>Last Modified Date:</b> 12/3/2008
<b>Term:</b> 12 Months		<b>Invoice Due Date:</b>	

**Insured:**  
LULA JOHNSON  
3019 155TH ST.  
Milwaukee, WI 53206  
414-444-4444

**Producer:**  
90700 - 0000002  
AUM BIKELINE  
P.O. Box 906  
Pewaukee , WI 53072

**Agency:**  
90700  
AUM DIRECT  
P O BOX 906  
PEWAUKEE , WI 53072-0906  
800-236-2862

**Transaction Type:**  
<Select Type> Go

**Quick Filter**  
All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	12/3/2008	12/3/2009	\$79.00	\$79.00	Approved	kramsby	N/A

Upon clicking on the “Diary/Attachments” Icon, a Policy Details Screen will display, as shown below.

**Policy Details**
Show/Hide

Client Name:

LULA JOHNSON

Policy No.:

QT00000033090

Status:

Quote

Contact:

414-444-4444

Eff/Exp Date:

12/3/2008 to 12/3/2009

Agency:

AUM DIRECT

Phone No.:

3019 155TH ST.

LOB:

RecVehicle\_Motorcycle

Producer:

BIKELINE

Address:

3019 155TH ST.  
Milwaukee, WI 53206

Return to Policy

**Diary Items**
Show/Hide

Add Diary Item

Filter By:

Quick Query:

All

Additional Filters:

and

Sender

contains

Current Filters:

quotelD

35621

Apply

Clear

Save Table Settings

Restore Defaults

Date Originated	UserID Originate	Activity	Description	Priority	Policy #	Policy Eff Date	Due Date	UserID Closed	Closed Date	Attachments
12/3/2008, 5:31	kramsby	Approve	QT00000033090	2-Normal				System		
12/3/2008, 5:26	MCLevel3IntUs	Refer	QT00000033090	2-Normal				System		

Page 1 of 1

2 results found. Currently showing 1 - 2.

Current Attachments

Date	Caption	FileName
------	---------	----------

File To Upload:

Browse...

Enter caption:

Add Attachment

#### Policy History

The area displayed in pink above is the Attachment function.


#### To add an Attachment:

- Click on “Browse”.
- Search your computer to find the document you’d like to attach.
- Once you’ve found the document, click on the document name and then click on “Open”.
- In the “Enter Caption” field, enter the name of how you would like the attachment labeled.
- Click “Add Attachment” to attach the file to the policy.

#### To add a Diary Item:

- Click on “Add Diary Item”.
- A Message Details screen will appear as shown below.




**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: Statewide General Agency

*indicates a required field.*

Close Message

### Message Information

Create Date: 2009-11-09T15:06:54      Created By: mhlevel3ext

### Message

Security Level: Public      Activity/Reason: (Select)      Priority: Medium      Due Date: N/A

Subject:

Body:

Add Recipient

### Message Recipients

Category: Policy-Level      Recipient: N/A      Policy/Client ID: 61791

Post      Cancel

3. Select the Activity/Reason.
4. Select the Priority.
5. Enter a Due Date, if applicable.
6. Enter a Subject.
7. Enter the Body text.
8. In the **Message Recipients** area, select the Category. If one of the “specified” categories is chosen, a list of potential Recipients will appear in a drop down box.
9. To add a Recipient, click/select their name from the drop down list, and then click the “Add Recipient” button.
10. If you would like to add an attachment, click the “Allow Attachments” button.  
Once the latter has been completed, click “Update Details”. This will send the message

## VIEWING A POLICY

Once a policy is activated, you can use the “Open” function to search for the policy.

1. Search for the policy you are looking for.

**Reminder:** Instructions on how to search for a policy or quote can be found in the section titled “Open” at the beginning of this manual.

**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: MARKEL AMERICAN INSURANCE CO

Home New Open Diary/Messages Password Logout

### Open Existing Quote/Policy

**Available Quotes And Policies** Show/Hide

**Quick Searches:**

Name >   
Quote/Policy # >   
RecVehicle\_Motorcycle

**Advanced Search:**

and  LOB  contains    
 Quick Query:    
☐ Save Filter

**Current Filters:**

Policy No contains greaterthan RecVehicle\_Motorcycle

☐ View Deleted

	Policy/Quote Number	Insured Name	State	Line	Status	Transaction	Description	Eff. Date	Last Modified
	<a href="#">QT00000031946</a>	123 123	WI	<a href="#">RecVehicle_Motor</a>	Quote	New-Pending		11/17/2008	12/3/2008
	<a href="#">MMT00000014415</a>			<a href="#">RecVehicle_Motor</a>	Cancelled	Cancel-Committed		11/18/2008	11/18/2008
	<a href="#">MMT00000013607</a>			<a href="#">RecVehicle_Motor</a>	InForce	New-Committed		10/26/2008	12/3/2008
	<a href="#">MMT00000014444</a>			<a href="#">RecVehicle_Motor</a>	Cancelled	Cancel-Committed		11/17/2008	11/18/2008
	<a href="#">QT00000032615</a>			<a href="#">RecVehicle_Motor</a>	Quote	New-Pending		11/26/2008	12/3/2008
	<a href="#">QT00000032581</a>			<a href="#">RecVehicle_Motor</a>	Quote	New-Pending		11/25/2008	12/3/2008
	<a href="#">QT00000032585</a>			<a href="#">RecVehicle_Motor</a>	Quote	New-Pending		11/25/2008	12/1/2008
	<a href="#">QT00000030087</a>			<a href="#">RecVehicle_Motor</a>	Quote	New-Pending		10/10/2008	11/14/2008
	<a href="#">MMT00000014078</a>			<a href="#">RecVehicle_Motor</a>	InForce	Reissue-Committe		11/23/2008	12/3/2008
	<a href="#">MMT00000014258</a>			<a href="#">RecVehicle_Motor</a>	InForce	Endorse-Pending		11/4/2008	11/21/2008

Page 1 of 115 1144 results found. Currently showing 1 - 10.

2. Click on the policy number (shown on the left-hand side).
3. You will be taken to the [TransACT screen](#) as shown below.

View Service History

Apply Payment

<b>Policy Number:</b> MMT00000013607	<b>Written Premium:</b> \$75.00	<b>Effective Date:</b> 10/26/2008	<b>Risk State:</b> WI
<b>Status:</b> InForce	<b>Payment Plan:</b> Full Pay	<b>Expiration Date:</b> 10/26/2009	<b>Rate Effective Date:</b> 10/6/2008
<b>Product:</b> RecVehicle_Motorcycle	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b>	<b>Last Modified Date:</b> 10/6/2008
<b>Term:</b> 12 Months		<b>Invoice Due Date:</b>	

**Insured:**  
ACTION JACKSON, 4TH  
N28W23515 GREEN ROAD  
Pewaukee, WI 53072  
262-695-5657  
ACTIONJACKSON@GMAIL.COM

**Producer:**  
90700 - 0000002  
AUM BIKELINE  
P.O. Box 906  
Pewaukee , WI 53072

**Agency:**  
90700  
AUM DIRECT  
P O BOX 906  
PEWAUKEE , WI 53072-0906  
800-236-2862

**Transaction Type:**  

<Select Type>


Go

**Quick Filter**  

All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	10/26/2008	10/26/2009	\$75.00	\$75.00	Committed	kwang	10/7/2008

- From the [TransACT screen](#), to simply view the policy, click on the magnifying glass, (the icon on the far left). This will allow you to view the policy as read only.
- When you are finished viewing the policy, click on the Submission tab and then click “Return to Admin”. This will take you back to the [TransACT screen](#) where you started in step 3.


**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: MARKEL AMERICAN INSURANCE CO

MAIC Motorcycle WI (00.00.02)  
[Policy Details/Attachments](#)

[Home](#)
[New](#)
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[Password](#)
[Logout](#)

LULA JOHNSON (InForce - New-Committed)  
MMT00000014719 - RecVehicle\_Motorcycle  
AUM DIRECT - AUM BIKELINE

[Policy Information](#)
[Owner Personal](#)
[Unit](#)
[Operator](#)
[Operator Assignment](#)
[Additional Interest](#)
[Coverage](#)
[Coverage Rejection/Selection](#)
[Submission](#)
[Rating Worksheet](#)
[Return To Admin](#)

**Name:** LULA JOHNSON

**Previous Policy Number:** N/A

**Premiums**

<b>Total Annual Premium:</b>	<b>Total Written:</b>	<b>Prior Total Annual:</b>	<b>Written Change:</b>
\$79.00	\$79.00	\$0.00	\$79.00

**Billing Instructions**

Bill Insured

**Billing Information**

<b>Name</b>	LULA JOHNSON
<b>ZIP</b>	53206
<b>Address 1</b>	3019 155TH ST.
<b>Address 2</b>	
<b>City/County</b>	Milwaukee/Milwaukee
<b>State</b>	WI
<b>Email</b>	

**Available Actions**

[Return To Admin](#)

[Previous](#) [Next](#)

From the [TransACT screen](#) you may then service the policy as you normally would, including applying a payment.

*The Section that follows will cover all aspects of Policy Maintenance using TransACT.*

# TransACT—POLICY MAINTENANCE

## TransACT ICONS (Next to each transaction)

There are 3 Icons that appear on the [TransACT Screen](#) next to each transaction. (see screen shot below)

The screenshot shows the TransACT interface for Markel American Insurance Company. It displays policy details for Policy Number MMT00000014719, including status, premium, effective dates, and insured information. Below this is a table of transactions. Three red arrows point to icons in the first column of the transaction table:

- 1. View Policy icon (magnifying glass)
- 2. Get Change Summary icon (document with arrows)
- 3. Schedule to Abort icon (X mark)

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	12/3/2008	12/3/2009	\$79.00	\$79.00	Committed	kramsby	12/3/2008
Endorse	12/3/2008	12/3/2009	\$79.00	\$0.00	Pending		N/A

### 1. View Policy

Will allow you to view the policy as read only. No changes can be made.

### 2. Get Change Summary

Will display a screen showing the changes made by that transaction if applicable.

### 3. Schedule to Abort

Will prevent 'Scheduled' transaction from occurring if not already committed. If the "X" is clicked, the scheduled transaction will be removed.

1. In the Transaction Type drop down box, select “Endorse” and click “Go”.

<b>Policy Number:</b> MMT00000014719	<b>Written Premium:</b> \$79.00	<b>Effective Date:</b> 12/3/2008	<b>Risk State:</b> WI
<b>Status:</b> InForce	<b>Payment Plan:</b> Full Pay	<b>Expiration Date:</b> 12/3/2009	<b>Rate Effective Date:</b> 12/3/2008
<b>Product:</b> RecVehicle_Motorcycle	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b>	<b>Last Modified Date:</b> 12/3/2008
<b>Term:</b> 12 Months		<b>Invoice Due Date:</b>	

<b>Insured:</b> LULA JOHNSON 3019 155TH ST. Milwaukee, WI 53206 414-444-4444	<b>Producer:</b> 90700 - 0000002 AUM BIKELINE P.O. Box 906 Pewaukee, WI 53072	<b>Agency:</b> 90700 AUM DIRECT P O BOX 906 PEWAUKEE, WI 53072-0906 800-236-2862
--	---	---

**Transaction Type:**

**Quick Filter**

	Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
	New	12/3/2008	12/3/2009	\$79.00	\$79.00	Committed	kramsby	12/3/2008
	Endorse	12/3/2008	12/3/2009	\$79.00	\$0.00	Pending		N/A

2. Enter the Effective Date of your Endorsement transaction
3. Select the Reason for your transaction from the Reason drop down box (you may select multiple reasons by clicking the “Add Reason” button). Additional notes about your transaction may be entered in the “Detail” box. **Note: This information will be printed on the Declarations Page.** (See Screen Shot that follows.)

Markel American Insurance Company

## Endorse

\* indicates a required field

**Effective Date**  \*

**Reason**

**Detail**

**Print Suppress** ☐

12/3/2009
\$79.00
\$79.00
Committed kramsby
12/3/2008

4. After you have completed the page, click “Continue”. If you do not wish to continue, click “Exit” and you will be returned to the [TransACT Screen](#).

The system will present you with the policy master pages which allow you to access any of the pages to make the necessary changes to the policy.

Upon completion of your changes, proceed to the Submission page by clicking on the “Submission” tab or continuing to click “Next”.

If the endorsement is out of the agent’s authority, a referral will be required. Click on the button labeled “Refer”.

Markel American Insurance Company - Microsoft Internet Explorer

Address: <http://corpwebuat30:8083/express30/default.aspx#>

Name: LULA JOHNSON

Previous Policy Number: N/A Endorse / 12-03-2008

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$79.00	\$79.00	\$79.00	\$0.00

**Billing Instructions**

Bill Insured

**Billing Information**

Name: LULA JOHNSON  
ZIP: 53206  
Address 1: 3019 155TH ST.  
Address 2:  
City/County: Milwaukee/Milwaukee  
State: WI  
Email:

**Available Actions**

Refer Modify Reasons Complete Issuance

Previous Next

### Submission Screen:

The [Submission Screen](#) (as shown above) will show you the new premium amounts resulting from your transaction and the total amount of premium change.

### Modify Reasons:

The “Modify Reasons” button (see below) can be used to change the Reason that you selected for your transaction or to add additional Reasons.



Upon completion of your transaction, you can choose to “Complete Issuance” or “Save for Later”.

### Complete Issuance:

Will present you with a Remarks section where you can enter detailed remarks about your transaction.

### Save for Later:

Will return you to the [TransACT Screen](#) for your policy and you will see your transaction listed. You will see the status listed as “pending”.

**Note:** If you process multiple changes to a policy in one day, the insured will only receive the hard copy of the last Declarations Page that was generated even though all policy transactions will show up in pdf format in the Diary/Attachment section of the policy.

## CANCEL

When the Cancel function is chosen in TransACT, the ability to cancel due to Company Request or Insured Request is given.

### Company Requested Cancellation:

1. Select your transaction type of Cancel and click “Go”. (see screen that follows)



TransACT Master 2.10

MARKEL AMERICAN INSURANCE COMPANY

Current Association: MARKEL AMERICAN INSURANCE CO

Home New Open Diary/Messages Password Logout

Policy Details/Attachments

Trans ACT

View Service History Apply Payment

**Policy Number:** MMT00000014719 **Written Premium:** \$79.00 **Effective Date:** 12/3/2008 **Risk State:** WI  
**Status:** InForce **Payment Plan:** Full Pay **Expiration Date:** 12/3/2009 **Rate Effective Date:** 12/3/2008  
**Product:** RecVehicle\_Motorcycle **Billing Method:** Direct Bill **Equity Date:** **Last Modified Date:** 12/3/2008  
**Term:** 12 Months **Invoice Due Date:**

**Insured:** LULA JOHNSON  
3019 155TH ST.  
Milwaukee, WI 53206  
414-444-4444

**Producer:** 90700 - 0000002  
AUM BIKELINE  
P.O. Box 906  
Pewaukee, WI 53072

**Agency:** 90700  
AUM DIRECT  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

**Transaction Type:** Cancel **Go**

**Quick Filter:** All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	12/3/2008	12/3/2009	\$79.00	\$79.00	Committed	kramsby	12/3/2008
Endorse	12/3/2008	12/3/2009	\$79.00	\$0.00	Pending		N/A
Endorse	12/3/2008	12/3/2009	\$79.00	\$0.00	Committed	MCLevel2IntUser	12/3/2008

2. Select a Reason for cancellation from the drop down box.

For company request cancels you must also fill in the Detail box with more specific, appropriate detail as this verbiage will also print on the Cancellation form.

Ex. You select the reason called “Unacceptable Driving Record” but in the detail box (see below) you insert: “Speeding violations: 1/2007, 3/2006, etc.”

You need to put enough detail that the insured understands exactly why they were canceled because if you do not, in some states the cancellation form will be considered unacceptable and void.

Markel American Insurance Company

## Cancel

\* indicates a required field

<b>Reason</b>	<b>Detail</b>
Risk Unacceptable	* unacceptable risk *
<b>Return Method</b>	Prorata *
<b>Effective Date</b>	11/28/2009 *
<b>Schedule Date (optional):</b>	11/14/2009
<b>Print Suppress</b>	<input type="checkbox"/>

Exit Continue

- The Return Method box will automatically populate with the cancel method choices you have based on the Reason for Cancellation. You must choose a method.

The Reason you selected in Step 1 above determined that this was a Company Request cancellation so the system automatically populated the Cancellation Effective date with the earliest legal cancel date based on state requirements and proper mailing time.

Note: The "Schedule Date" will tell you the actual day that the system will change the policy status from InForce to Cancel and is informational only.

- Click the "Continue" button to proceed OR "Exit" to return to the [TransACT Screen](#).

Markel American Insurance Company

## Cancel

<b>Reason</b>	<b>Detail</b>
Agent Request	
<b>Return Method</b>	Prorata
<b>Effective Date</b>	12/18/2008
<b>Schedule Date (optional):</b>	12/23/2008
<b>New Premium</b>	\$3.00
<b>Charge</b>	-\$76.00

Abort Schedule

The next screen will now show you the new written premium on this policy along with the unearned premium (negative written change) that will be applied once the policy is truly cancelled.

5. Click the “Schedule” button to finish the Cancellation transaction and be returned to the main [TransACT Screen](#) OR click the “Abort” button if you want to back out from the transaction and return to main [TransACT Screen](#).

**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: MARKEL AMERICAN INSURANCE CO.

TransACT Master 2.10  
Policy Details/Attachments

Home New Open Diary/Messages Password Logout

Trans ACT

View Service History Apply Payment

<b>Policy Number:</b> MMT0000014719	<b>Written Premium:</b> \$79.00	<b>Effective Date:</b> 12/3/2008	<b>Risk State:</b> WI
<b>Status:</b> InForce	<b>Payment Plan:</b> Full Pay	<b>Expiration Date:</b> 12/3/2009	<b>Rate Effective Date:</b> 12/3/2008
<b>Product:</b> RecVehicle_Motorcycle	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b>	<b>Last Modified Date:</b> 12/3/2008
<b>Term:</b> 12 Months		<b>Invoice Due Date:</b>	

**Insured:**  
LULA JOHNSON  
3019 155TH ST.  
Milwaukee, WI 53206  
414-444-4444

**Producer:**  
90700 - 0000002  
AUM BIKELINE  
P.O. Box 906  
Pewaukee, WI 53072

**Agency:**  
90700  
AUM DIRECT  
P.O. BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

**Transaction Type:**  
<Select Type> Go

**Quick Filter:**  
All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	12/3/2008	12/3/2009	\$79.00	\$79.00	Committed	kramsby	12/3/2008
Endorse	12/3/2008	12/3/2009	\$79.00	\$0.00	Pending		N/A
Endorse	12/3/2008	12/3/2009	\$79.00	\$0.00	Committed	MCLevel2IntUser	12/3/2008
Cancel	12/4/2008	12/3/2009	\$50.00	-\$29.00	Committed	MCLevel2IntUser	12/3/2008

Done Local intranet

The main [TransACT Screen](#) will show you that your Cancellation is ‘scheduled’ and will display the effective date as well.

Scheduling the transaction will cause the Direct Notice of Cancellation to print and be sent to the customer the next morning.

If you click the “Abort” button ( Red ‘X’ to the left of the Cancel transaction), then you will abort the scheduled cancel and if the notice was already printed, a continuation notice will be sent to the customer to tell them their policy will not be cancelled.

Ex. You scheduled a cancellation on the policy for lack of an updated survey but then you received the survey from the customer, so you use the “Abort” function which will remove the scheduled cancellation and will generate a continuation notice during the nightly batch which will be mailed the next business day.

**Note:** In the example shown above, the policy will officially be cancelled as of **12/4/2008** (policyholder has no coverage from this point on). The policy status in the system will not change from Inforce to Canceled until the transaction is Committed during the nightly batch run on 12/9/08.

## Insured Requested Cancellation:

1. Select your transaction type of Cancel and click "Go".

TransACT Master 2.10

**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: MARKEL AMERICAN INSURANCE CO

Home New Open Diary/Messages Password Logout

Policy Details/Attachments

Trans ACT

View Service History Apply Payment

**Policy Number:** MMT00000014719 **Written Premium:** \$79.00 **Effective Date:** 12/3/2008 **Risk State:** WI  
**Status:** InForce **Payment Plan:** Full Pay **Expiration Date:** 12/3/2009 **Rate Effective Date:** 12/3/2008  
**Product:** RecVehicle\_Motorcycle **Billing Method:** Direct Bill **Equity Date:** **Last Modified Date:** 12/3/2008  
**Term:** 12 Months **Invoice Due Date:**

**Insured:** LULA JOHNSON  
3019 155TH ST.  
Milwaukee, WI 53206  
414-444-4444

**Producer:** 90700 - 0000002  
AUM BIKELINE  
P.O. Box 906  
Pewaukee, WI 53072

**Agency:** 90700  
AUM DIRECT  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

**Transaction Type:** Cancel

**Quick Filter:** All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	12/3/2008	12/3/2009	\$79.00	\$79.00	Committed	kramsby	12/3/2008
Endorse	12/3/2008	12/3/2009	\$79.00	\$0.00	Pending		N/A
Endorse	12/3/2008	12/3/2009	\$79.00	\$0.00	Committed	MCLevel2IntUser	12/3/2008

2. Select a Reason for cancellation from the drop down box.
3. If the Detail box is required, please enter any required, appropriate details/reasons.
4. The Return Method box will automatically populate with the cancel method choices you have based on the Reason for Cancellation. You must choose a method.

Markel American Insurance Company

### Cancel

\* indicates a required field

**Reason**  
Insured Request \*

**Detail**  
sold \*

**Return Method**  
90% Prorata \*

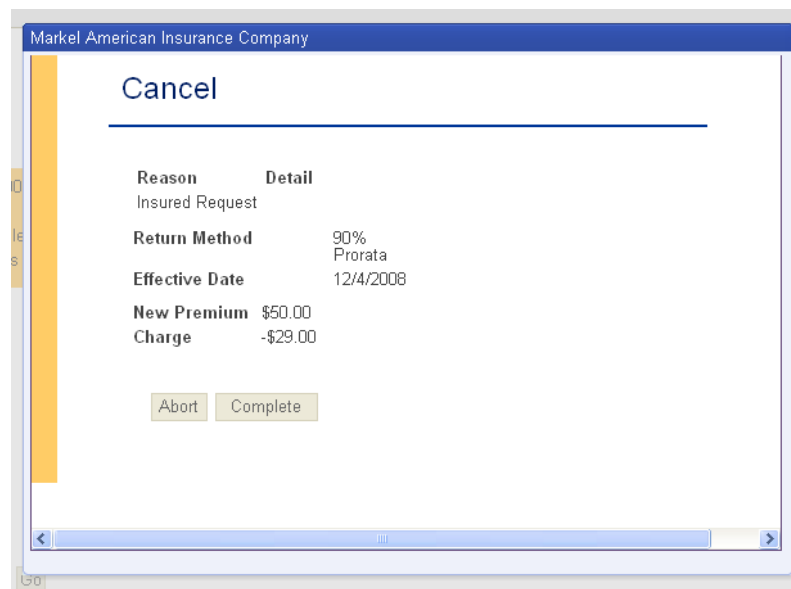
**Effective Date**  
12/4/2008 \*

**Print Suppress** ☐

Exit Continue

The Cancellation effective date should be entered based on the date requested by the insured. The system automatically populates today's date so you will need to adjust date accordingly.

5. Click the "Continue" button to proceed OR "Exit" if you want to return to the [TransACT Screen](#) with no changes.



Markel American Insurance Company

### Cancel

Reason	Detail
Insured Request	
Return Method	90% Prorata
Effective Date	12/4/2008
New Premium	\$50.00
Charge	-\$29.00

The next screen (as previously shown) will show you the new written premium on this policy along with the unearned premium (negative written change) that will be applied once the policy is truly cancelled.

6. Click the "Complete" button to finish the Cancellation transaction and be returned to the main [TransACT Screen](#) OR click the "Abort" button if you want to back out from the transaction and return to main [TransACT Screen](#).


**MARKEL AMERICAN INSURANCE COMPANY**  
Current Association: MARKEL AMERICAN INSURANCE CO

TransACT Master 2.10  
[Policy Details/Attachments](#)

[Home](#) [New](#) [Open](#) [Diary/Messages](#) [Password](#) [Logout](#)

Trans ACT

[View Service History](#) [Apply Payment](#)

<b>Policy Number:</b> MMT00000014719	<b>Written Premium:</b> \$79.00	<b>Effective Date:</b> 12/3/2008	<b>Risk State:</b> WI
<b>Status:</b> InForce	<b>Payment Plan:</b> Full Pay	<b>Expiration Date:</b> 12/3/2009	<b>Rate Effective Date:</b> 12/3/2008
<b>Product:</b> RecVehicle_Motorcycle	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b>	<b>Last Modified Date:</b> 12/3/2008
<b>Term:</b> 12 Months		<b>Invoice Due Date:</b>	

**Insured:**  
LULA JOHNSON  
3019 156TH ST.  
Milwaukee, WI 53206  
414-444-4444

**Producer:**  
90700 - 0000002  
AUM BIKELINE  
P.O. Box 906  
Pewaukee, WI 53072

**Agency:**  
90700  
AUM DIRECT  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

**Transaction Type:**  

<Select Type>

Go

**Quick Filter**  

All

	Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
	New	12/3/2008	12/3/2009	\$79.00	\$79.00	Committed	kramsby	12/3/2008
	Endorse	12/3/2008	12/3/2009	\$79.00	\$0.00	Pending		N/A
	Endorse	12/3/2008	12/3/2009	\$79.00	\$0.00	Committed	MCLevel2IntUser	12/3/2008
	Cancel	12/4/2008	12/3/2009	\$50.00	-\$29.00	Committed	MCLevel2IntUser	12/3/2008

Done
Local intranet

Once you return to the main [TransACT Screen](#), it will show you that the transaction has been Committed and the insured's policy is cancelled as of the date requested. No forms will be generated.



## REINSTATE

Reinstate will be available in the dropdown box if this is an allowed transaction on the policy.

1. Select “Reinstate” and Click “Go”.

Markel American Insurance Company - Windows Internet Explorer

http://maicwebtest04:8097/DuckCreekExpress3x/default.aspx

File Edit View Favorites Tools Help

Markel American Insurance Company

TransACT Master 2.10

Policy Details/Attachments

Home New Open Diary/Messages Password Logout

Trans ACT

Policy Number: MMH00000070099  
Status: Cancelled  
Product: Property\_MobileHome  
Term: 12 Months

Insured:  
SUSAN BROWN  
100 MAIN ST  
Louisville, KY 40202  
232-323-4455

Transaction Type:  
Reinstate Go

Effective Date: 11/4/2009

Reason Detail  
See Detail

Add Reason

Print Suppress ☐

Exit OK

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	11/4/2009	11/4/2010	\$348.26	\$348.26	Committed	sciszext	
Cancel	11/4/2009	11/4/2010	\$0.00	-\$348.26	Committed	sciszext	

Done

Local intranet 100%

2. The Effective date is automatically populated by the system and the date is equal to the previous cancel date.
3. Choose a reason for the reinstatement and enter any necessary detail. The Add Reason button is to be used if you want to show multiple reasons for reinstatement.
4. Click the “OK” button to proceed (as shown above).
5. Click “OK” to proceed with Reinstatement OR click the “Exit” button to back out of transaction and be returned to [TransACT Screen](#) without action.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Print Mail Address http://corpwebuat30:8083/Express30/default.aspx Go Google Settings

**MARKEL AMERICAN INSURANCE COMPANY**

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

JOY RIDER (Cancelled - Cancel - Committed)  
MSB00000005456

TransACT View Service History

Policy Number: MSB00000005456	Written Premium: \$277.00	Effective Date: 2/26/2008	Risk State: IL
Status: InForce	Payment Plan: Full Pay	Expiration Date: 2/26/2009	Rate Effective Date: 2/26/2008
Product: SmallBoat_SmallBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 2/26/2008
Term: 12 Months	Grace Equity Date:		

**Insured:**  
JOY RIDER  
1 MARINA WAY  
Rockford, IL 61108  
262-548-9880

**Producer:**  
90700 - 0000001  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

**Agency:**  
90700  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

Transaction Type:  Quick Filter:

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	
Endorse	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	kramsby	
Cancel	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	kramsby	
Reinstate	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	

Done Local intranet

You will be returned to the [TransACT Screen](#) and the Reinstate transaction should negate the Written Change column and Total Written Premium generated from the Cancellation transaction.

Reissue will be available in the dropdown box if this is an allowed transaction on the policy.

A policy may be reissued up to 7 days prior to the effective date of the policy if the cancellation method used is flat. The policy must be rewritten equal to or greater than the current cancellation date if the cancellation method used is other than cancel flat.

1. Select “Reissue” and Click “Go”.

Type	Effective Date	Ex
New	2/26/2008	2/26/2008
Endorse	2/26/2008	2/26/2009
Cancel	2/26/2008	2/26/2009
Reinstate	2/26/2008	2/26/2009
Cancel	2/27/2008	2/26/2009

2. Verify the effective date of the reissue and change if needed.
3. Click on drop down box to change the no to yes if you are reissuing the policy to change the agent or the mooring state. This will enable you to change the agent or location state.
4. If the reissue is for any other reason, click on the drop down box and select the applicable reason. If you have more than one reason you need to enter, click on the add reason box. (See screen print below)
5. Click “Continue” to proceed or “Exit” to stop processing the reissue.
6. Amend the policy as needed.
7. Click the submission tab to be taken to the last page of the reissue. (See the screen print below)

TEST LIABILITY (Cancelled - Reissue-Pending)  
MMH0000070164 - Property MobileHome  
STATEWIDE GENERAL AGENCY INC - Statewide General Agency

Policy Information | Owner Personal | Unit | Underwriting | Additional Interest | Coverage | Submission | Rating Worksheet | Save and Exit

Name: TEST LIABILITY

Previous Policy Number: N/A Usage: Owner Occupied Reissue / 11/9/2009

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$1,676.40	\$1,676.40	\$0.00	\$1,676.40

**Issue Notes**

Remarks

**Billing Instructions**

Bill Insured

**Billing Information**

Name: TEST LIABILITY  
ZIP: 41339  
Address 1: P O BOX 471  
Address 2:  
City/County: Noctor/Breathitt  
State: KY  
Email:

**Available Actions**

Modify Reasons Complete Issuance

8. Add any applicable comments and click "Complete Issuance".

Markel American Insurance Company

## Payment Information

*\* indicates a required field*

**Policy Information**

Full Annual Premium	Policy Term	Coverage Start Date	
\$1,676.40	12 Months	11/09/2009	<a href="#">View Payment Schedules</a>

Expiration Date: 11/09/2010

**Payment**

Payment Plan: Two Installments

Payment Type: (select)

Amount \* Minimum Payment Amount \$843.20

Cancel Complete Issuance Commit Without Payment

9. Verify Pay Plan is correct and commit without payment, if there is already a payment on the policy.

## REVIEW BEFORE RENEW

1. Choose the Review before Renew option and click “Go”.

**Note: You cannot perform this action on a policy that has a committed cancel, is scheduled for non-renewal or has a pending renewal.**

The screenshot shows a web browser window titled "Market American Insurance Company - Microsoft Internet Explorer". The address bar displays "http://maicwebtest01:8093/DuckCreekExpress3x/default.aspx". The page content includes a "Trans ACT" tab, buttons for "View Service History" and "Apply Payment", and a detailed policy information section.

**Policy Information:**

<b>Policy Number:</b> MHY0000008253	<b>Written Premium:</b> \$1,092.00	<b>Effective Date:</b> 5/23/2008	<b>Risk State:</b> OK
<b>Status:</b> InForce	<b>Payment Plan:</b> Three Installments	<b>Expiration Date:</b> 5/23/2009	<b>Rate Effective Date:</b> 5/20/2008
<b>Product:</b> HYBoat_HYBoat	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b> 5/23/2009	<b>Last Modified Date:</b> 5/20/2008
<b>Term:</b> 12 Months		<b>Invoice Due Date:</b> 5/23/2009	

**Insured:**                      **Producer:**                      **Agency:**

**Transaction Type:**  
Review Before Renew [Go]

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	5/23/2008	5/23/2009	\$1,092.00	\$1,092.00	Committed	klimbo@seatosea	5/23/2008
Endorse	10/14/2008	5/23/2009	\$1,092.00	\$0.00	Pending		N/A

The Effective date is automatically populated by the system.

Market American Insurance Company - Microsoft Internet Explorer

Address: http://maicwebtest01:8093/DuckCreekExpress3x/default.aspx

Trans ACT

**Policy Number:** MHYD  
**Status:** InForce  
**Product:** HYBoat  
**Term:** 12 Mo

**Insured:**  
 ADAM MACCOLLICH

**Transaction Type:**

**Review Before Renew**

\* indicates a required field

**Effective Date** 11/24/2008 \*

**Reason** **Detail**

Review Before Renewal CHECK CLAIMS X

Review Before Renewal X

Add Reason

Exit Continue

**Apply Payment**

**Risk State:** OK  
**Effective Date:** 5/20/2008  
**Last Modified Date:** 5/20/2008

INSURANCE SVCS INC  
 CA 93448

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	5/23/2008	5/23/2009	\$1,092.00	\$1,092.00	Committed	klmbo@seatosea	5/23/2008
Endorse	10/14/2008	5/23/2009	\$1,092.00	\$0.00	Pending		N/A

2. Enter in the details of why you want to review before policy automatically renews.
3. Click the “Continue” button to proceed or “Exit” to return to [TransACT Screen](#).

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://corpwebuat30:8083/Express30/default.aspx

MARKET AMERICAN INSURANCE COMPANY

TransACT Master 2.10 Current Association: MARKET AMERICAN INSURANCE CO

Home New Open Diary Save Password Batch Change Association Logout

Diary/Attachments

TransACT

**Policy Number:** MHP00000005086  
**Status:** InForce  
**Product:** HPBoat\_HPBoat  
**Term:** 12 Months

**Insured:**  
 BUD LIGHT  
 1 MAIN ST  
 Boneta, UT 84001  
 262-548-9880

**Producer:**  
 90700-000  
 AMERICAN  
 P O BOX 90  
 PEWAWAUKEE  
 800-236-28

**Transaction Type:**

**TransACT Review Before Renew Pages**

**Review Before Renew**

**Effective Date** 2/26/2008

**Reason** **Detail**

Review Before Renewal CHECK CLAIMS

**Print Suppress** ☐

Abort Schedule

**BUD LIGHT (InForce - Endorse - Committed)**  
 MHP00000005086

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	1/23/2008	1/23/2009	\$5,836.00	\$2,325.00	Committed	HPLLevel2IntUser	1/28/2008
Endorse	1/28/2008	1/23/2009	\$5,836.00	\$2,325.00	Committed	HPLLevel2IntUser	1/28/2008

4. Click “Abort” if you’ve changed your mind about marking this policy for Review before Renew and want to be returned to the [TransACT Screen](#) OR click “Schedule” if you want to Mark the policy for Review before Renew.

The policy will show that you have scheduled this policy to be reviewed before it is automatically renewed in the future.

The Review before Renewal report will generate 90 days prior to the renewal date.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://corpwebuskt30/8083/Express30/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

**BUD LIGHT (InForce - ReviewBeforeRenew - Scheduled)**  
MHP00000005086

View Service History Apply Payment

Policy Number: MHP00000005086	Written Premium: \$5,836.00	Effective Date: 1/23/2008	Risk State: UT
Status: InForce	Payment Plan: Six Instalments	Expiration Date: 1/23/2009	Rate Effective Date: 1/28/2008
Product: HPBoat_HPBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 1/28/2008
Term: 12 Months	Grace Equity Date:		

**Insured:**  
BUD LIGHT  
1 MAIN ST  
Boneta, UT 84001  
262-548-9880

**Producer:**  
90700 - 0000001  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

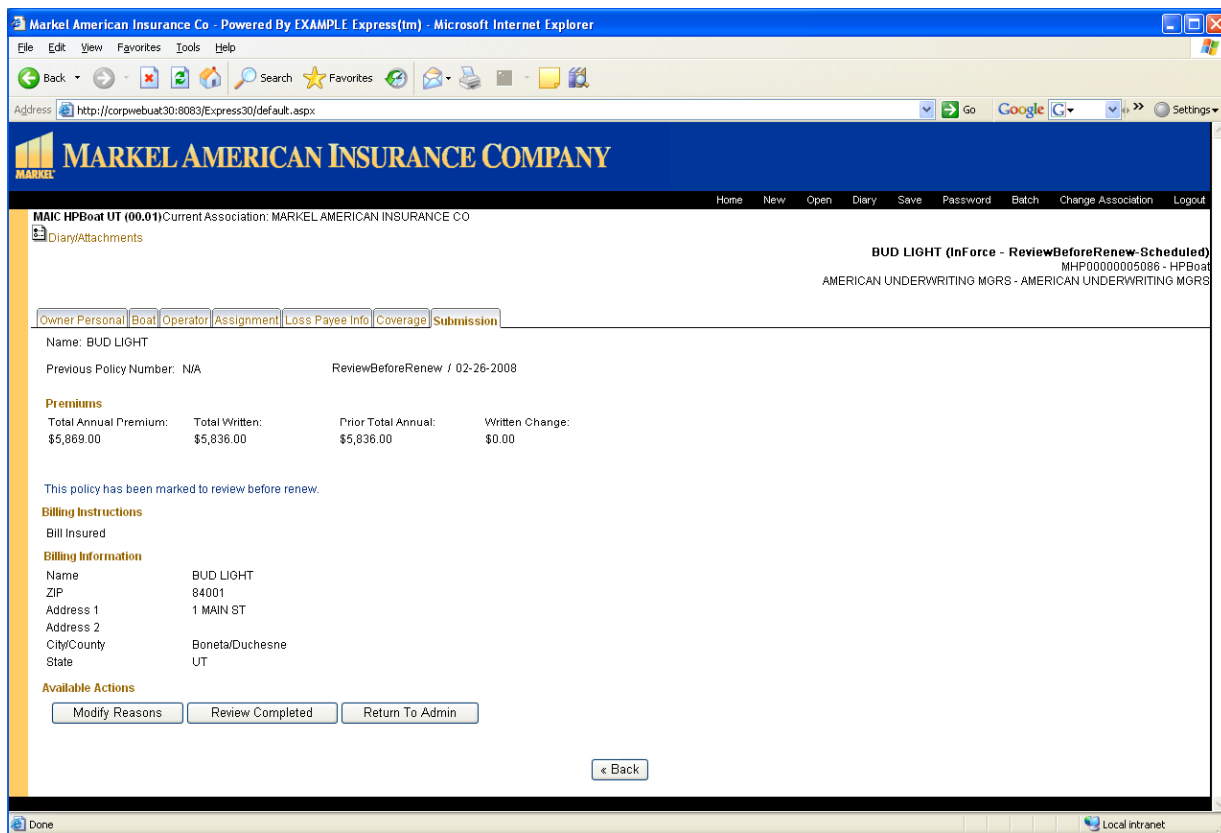
**Agency:**  
90700  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

This policy has been marked for Review Before Renew.

Transaction Type: <Select Type> Go Quick Filter: All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	1/23/2008	1/23/2009	\$3,511.00	\$3,511.00	Committed	HPLevel2IntUser	1/28/2008
Endorse	1/28/2008	1/23/2009	\$5,836.00	\$2,325.00	Committed	HPLevel2IntUser	1/28/2008
ReviewBeforeRenew	2/26/2008	1/23/2009	\$5,836.00	\$0.00	Scheduled	kramsby	N/A

6. To review the policy, click the Pencil icon (far left icon on the same transaction line of Review before Renew) and you will be taken into the policy to review it.
7. Once your review is complete, proceed to the [Submission Screen](#) (as shown below).



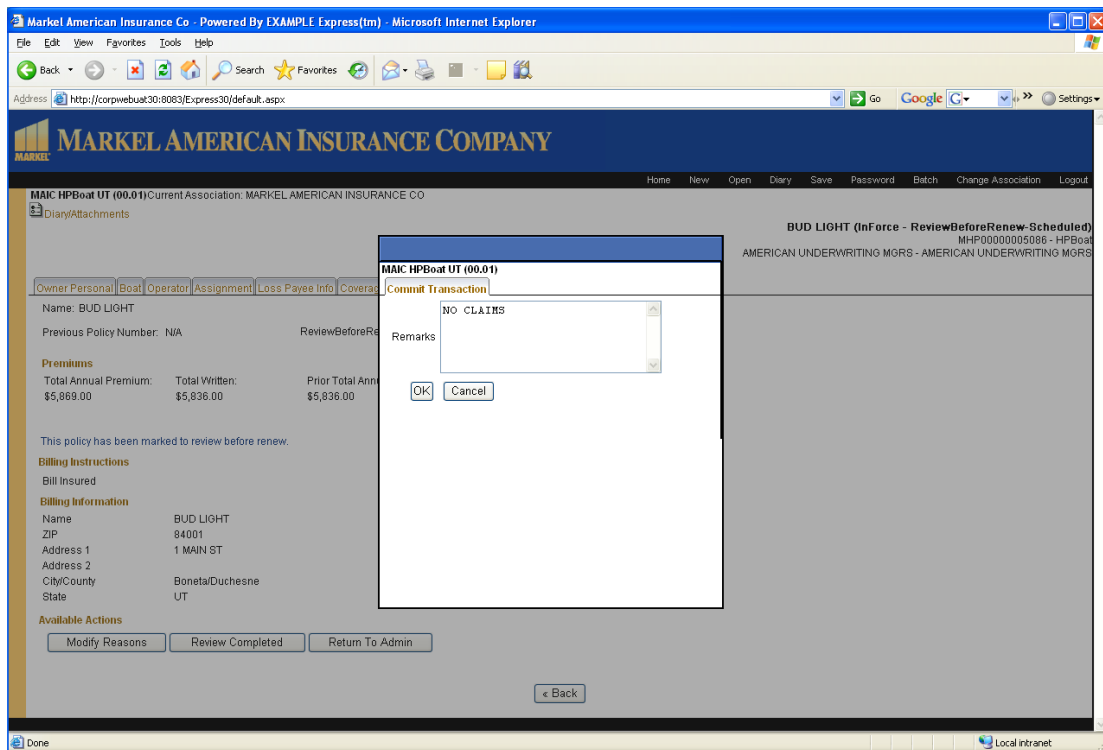
### Return to Admin:

This will take you back to the [TransACT Screen](#) and keep your Review before Renew transaction in a 'Scheduled' state. This means that it is still in a Review before Renew status and will show up in any messages/reports as such.

### Review Completed:

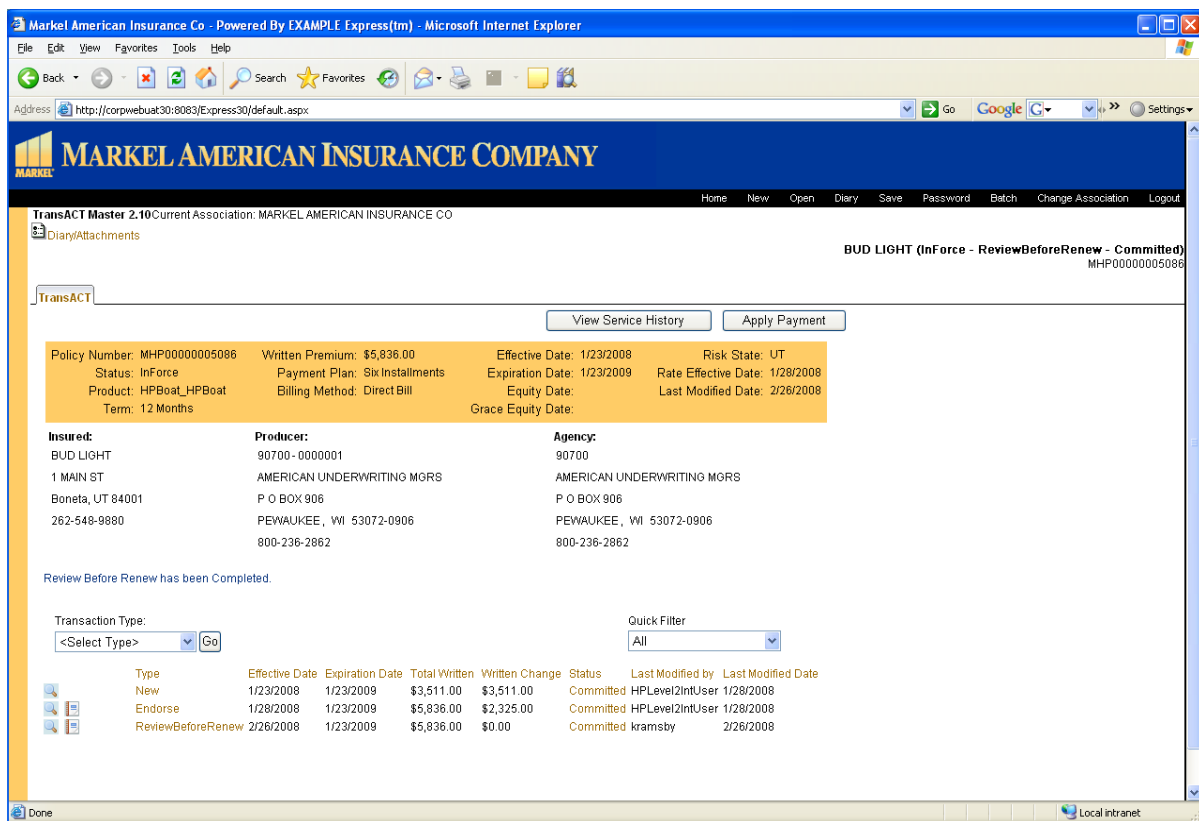
This will take you to the Remarks screen.





7. Type in any remarks that you would like saved with this transaction.

8. Click “OK” to return to the [TransACT Screen](#).



Review before Renew transaction now shows as Committed which means this process is now complete.

## RENEW

The Renew function in TransACT is used for either manually renewing the policy OR pre-staging the upcoming renewal with information that needs to be used by the system during the automatic renewal process.

Instructions follow for how to process each type of renewal function. Please ensure that you are processing the renewal in the appropriate manner.

### Renewal Prep:

This is pre-staging renewal changes that will get picked up during the normal renewal batch processing cycle. Renewal has a status of 'Scheduled'.

### Manually Renew:

This is actually renewing the policy before the normal renewal process would have applied. Renewal has a status of 'Committed'.

## Policy Transaction: Renewal Prep

1. Choose the Renew transaction and click "Go".

Market American Insurance Company - Microsoft Internet Explorer

Address: <http://maicwebtest01:8093/DuckCreekExpress3x/default.aspx>

Trans ACT

View Service History Apply Payment

<b>Policy Number:</b> MHY00000008253	<b>Written Premium:</b> \$1,092.00	<b>Effective Date:</b> 5/23/2008	<b>Risk State:</b> OK
<b>Status:</b> InForce	<b>Payment Plan:</b> Three Installments	<b>Expiration Date:</b> 5/23/2009	<b>Rate Effective Date:</b> 5/20/2008
<b>Product:</b> HYBoat_HYBoat	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b> 5/23/2009	<b>Last Modified Date:</b> 5/20/2008
<b>Term:</b> 12 Months		<b>Invoice Due Date:</b> 5/23/2009	

Insured: Producer: Agency:

Transaction Type: Renew Go

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	5/23/2008	5/23/2009	\$1,092.00	\$1,092.00	Committed	klimbo@seatosea	5/23/2008
Endorse	10/14/2008	5/23/2009	\$1,092.00	\$0.00	Pending		N/A

2. The effective date is the policy effective date of the renewal term.
3. Put the reason for why you are staging future changes to this policy (that will be picked up in the renewal batch processing).

The screenshot shows a web browser window titled "Markel American Insurance Company - Microsoft Internet Explorer". The address bar shows "http://maicwebtest01:8093/DuckCreekExpress3x/default.aspx". The main content area displays a "Renew" dialog box. The dialog box has a title bar "Markel American Insurance Company" and a subtitle "Renew". It contains the following fields and controls:

- Effective Date:** 5/23/2009
- Show Move Agency Option:** No (dropdown)
- Show Move State Option:** No (dropdown)
- Reason:** See Detail (dropdown)
- Detail:** (text input field with an asterisk indicating a required field)
- Add Reason:** (button)
- Print Suppress:** ☐
- Exit:** (button)
- Continue:** (button)

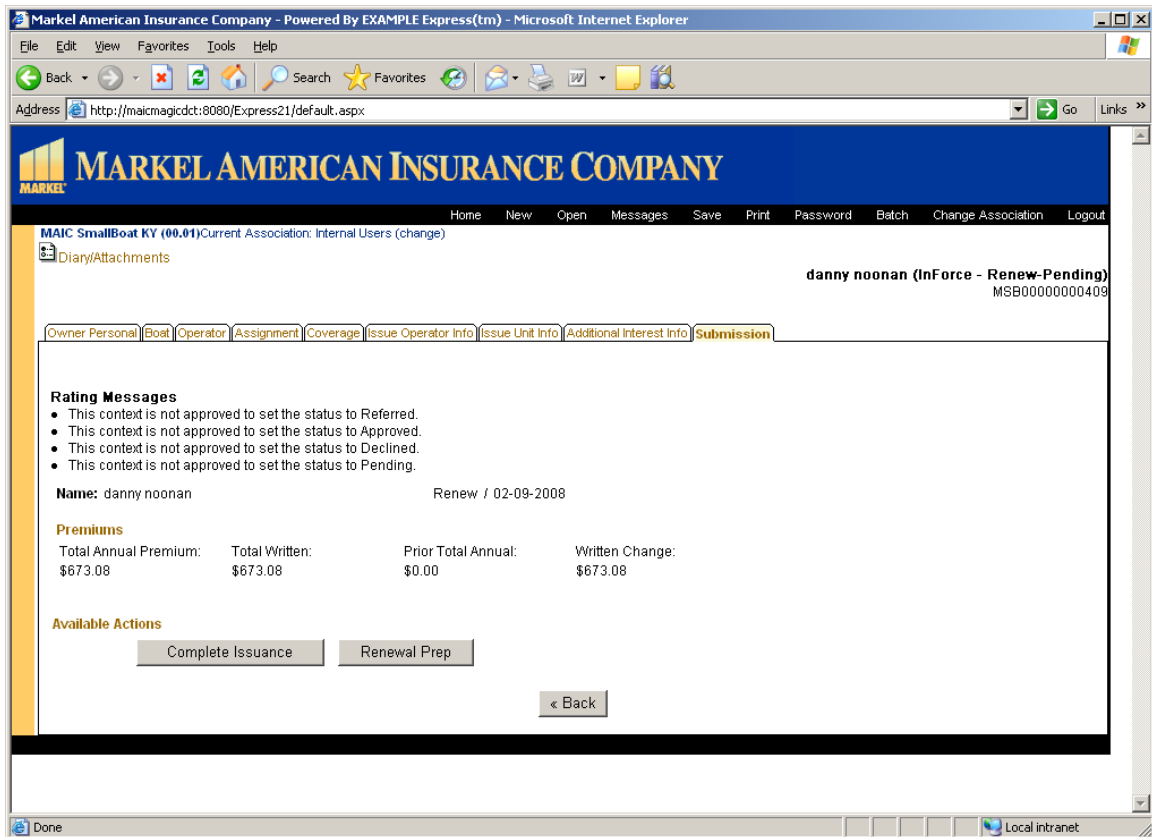
The background screen shows a "Trans ACT" screen with the following information:

- Policy Number:** MHYD
- Status:** InForce
- Product:** HYBo
- Term:** 12 Mo
- Insured:** (text input field)
- Transaction Type:** (text input field)
- Risk State:** OK
- Effective Date:** 5/20/2008
- Last Modified Date:** 5/20/2008
- INSURANCE SVCS INC**
- CA 93448**
- Last Modified Date:** 5/23/2008
- N/A**

The bottom of the screen shows a table with the following data:

Type	Endorse	10/14/2008	5/23/2009	\$1,092.00	\$0.00	Pending
New						

4. Click "Cancel" to return to TransACT without renewal prepping the policy OR,
5. Click "OK" which will move you forward in the process by taking you into the policy so that you can make your changes.
6. After you have made the necessary changes to the policy, go to the [Submission Screen](#) (as shown below) and click the "Renewal Prep" button which will return you to the [TransACT Screen](#).



- The Renewal Prepped policy shows as a scheduled renewal and will show as committed once the actual renewal has been generated and sent to customer.



## Policy Transaction: Manually Renewing a Policy

1. Choose the Renew transaction and click “Go”.

**Note: You cannot perform this action on a policy that already has a scheduled renewal. You must abort the scheduled renewal first, before manually renewing policy.**

The screenshot shows a web browser window titled "Market American Insurance Company - Microsoft Internet Explorer". The address bar displays "http://maicwebtest01:8093/DuckCreekExpress3x/default.aspx". The page content includes a "Trans ACT" tab, a "View Service History" button, and an "Apply Payment" button. A yellow box contains policy details:

<b>Policy Number:</b> MHY00000008253	<b>Written Premium:</b> \$1,092.00	<b>Effective Date:</b> 5/23/2008	<b>Risk State:</b> OK
<b>Status:</b> InForce	<b>Payment Plan:</b> Three Installments	<b>Expiration Date:</b> 5/23/2009	<b>Rate Effective Date:</b> 5/20/2008
<b>Product:</b> HYBoat_HYBoat	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b> 5/23/2009	<b>Last Modified Date:</b> 5/20/2008
<b>Term:</b> 12 Months		<b>Invoice Due Date:</b> 5/23/2009	

Below the yellow box, there are fields for "Insured:", "Producer:", and "Agency:". At the bottom, there is a "Transaction Type:" dropdown menu with "Renew" selected and a "Go" button. Below this, there is a table with transaction history:

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	5/23/2008	5/23/2009	\$1,092.00	\$1,092.00	Committed	klimbo@seatosea	5/23/2008
Endorse	10/14/2008	5/23/2009	\$1,092.00	\$0.00	Pending		N/A

2. The effective date is the policy effective date of the renewal term.
3. Put the reason for manually renewing the policy before the normal renewal process would have applied (see screen shot that follows).
4. Click “Cancel” to return to TransACT without renewing the policy OR,
5. Click “OK” which will move you forward in the process by taking you into the policy for any potential changes. (See Screen shot below)

Trans ACT

Policy Number: MHYB  
Status: InForce  
Product: HYB  
Term: 12 Mo

Insured:

Transaction Type:

Effective Date 5/23/2009  
Show Move Agency Option No  
Show Move State Option No  
Reason Detail  
See Detail  
Add Reason  
Print Suppress  
Exit Continue

Endorse 10/14/2008 5/23/2009 \$1,092.00 \$0.00 Pending

Last Modified Date 5/23/2008 N/A

6. After you have made any change to the policy, go to the [Submission Screen](#) and click “Complete Issuance” to be taken to the [Remarks Screen](#).

MARKEL AMERICAN INSURANCE COMPANY

Home New Open Messages Save Print Password Batch Change Association Logout

MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)

Diary/Attachments

danny noonan (InForce - Renew-Pending)  
MSB00000000409

Owner Personal Boat Operator Assignment Coverage Issue Operator Info Issue Unit Info Additional Interest Info Submission

**Rating Messages**

- This context is not approved to set the status to Referred.
- This context is not approved to set the status to Approved.
- This context is not approved to set the status to Declined.
- This context is not approved to set the status to Pending.

Name: danny noonan Renew / 02-09-2008

**Premiums**

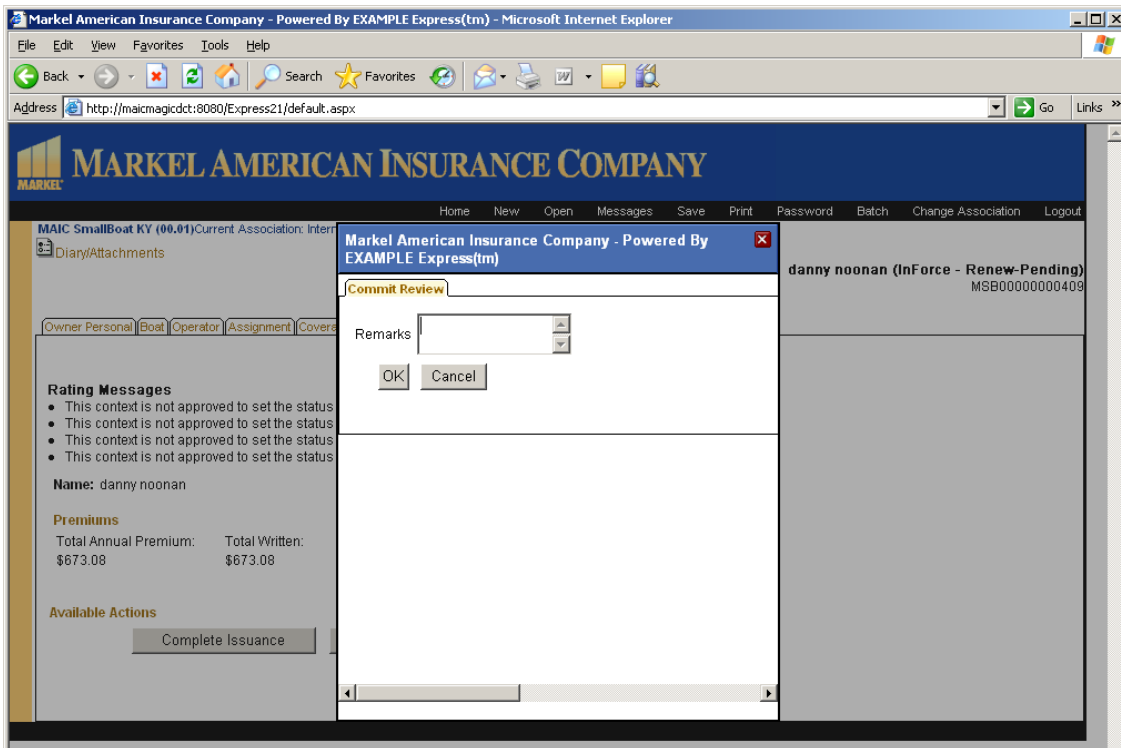
Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$673.08	\$673.08	\$0.00	\$673.08

**Available Actions**

Complete Issuance Renewal Prep

Back

**Note:** The use of the Renewal Prep button is found in documentation of Renewal Prepping a Policy.



7. Note, although referral messages may show, you may complete issuance any time the Complete Issuance button is available.
8. Put in your remarks on why you are renewing this policy ahead of time.
9. Click “OK” to complete this transaction and return to the [TransACT Screen](#) OR,
10. Click “Cancel” to move back a step and return to the [Submission Screen](#).

## NON-RENEW

1. Select the Non-renew transaction which will only be available on Inforce policies. Click “Go”.

The screenshot shows a web browser window titled "Market American Insurance Company - Microsoft Internet Explorer". The address bar displays the URL: `http://maicwebtest01:8093/DuckCreekExpress3x/default.aspx?XSLT=Skins/Market`. The page content includes a "Trans ACT" tab, buttons for "View Service History" and "Apply Payment", and a summary of policy details:

<b>Policy Number:</b> MHY00000008253	<b>Written Premium:</b> \$1,092.00	<b>Effective Date:</b> 5/23/2008	<b>Risk State:</b> OK
<b>Status:</b> InForce	<b>Payment Plan:</b> Three Installments	<b>Expiration Date:</b> 5/23/2009	<b>Rate Effective Date:</b> 5/20/2008
<b>Product:</b> HYBoat_HYBoat	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b> 5/23/2009	<b>Last Modified Date:</b> 5/20/2008
<b>Term:</b> 12 Months		<b>Invoice Due Date:</b> 5/23/2009	

Below the summary, there are fields for "Insured:", "Producer:", and "Agency:". The "Transaction Type:" dropdown menu is set to "Non-Renew", and a "Go" button is next to it. At the bottom, a table lists transaction details:

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	5/23/2008	5/23/2009	\$1,092.00	\$1,092.00	Committed	klimbo@seatosea	5/23/2008
Endorse	10/14/2008	5/23/2009	\$1,092.00	\$0.00	Pending	N/A	

The effective date will be filled in by the system as the earliest date possible based on proper days notice per the state for non-renewal. The notice will be mailed the next day after this date.

The Scheduled date will be filled in by the system as the policy expiration date.



Market American Insurance Company - Microsoft Internet Explorer

Address: http://maicwebtest01:8093/DuckCreekExpress3x/default.aspx?XSLT=5skins/Market

Trans ACT

**NonRenew**

\* indicates a required field

Effective Date: 4/18/2009 \*

Schedule Date (optional): 5/23/2009

Reason: Agent Request

Detail: loss history

Add Reason

Exit Schedule

Policy Number: MHY01  
Status: InForce  
Product: HYBo  
Term: 12 Mo

Insured:

Transaction Type:

Type: New

Endorse: 10/14/2008 5/23/2009 \$1,092.00 \$0.00 Pending

Risk State: OK  
Effective Date: 5/20/2008  
Modified Date: 5/20/2008

INSURANCE SVCS INC  
CA 93448

Last Modified Date: 5/23/2008 N/A

2. Choose Reason.
3. Enter reason specifics in the Detail field.
4. Click "Abort" to cancel this transaction and return to the [TransACT Screen](#) OR click "Schedule" to proceed with this transaction

Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://maicmagicdct:8080/Express21/default.aspx

TransACT Master 2.10 Current Association: Internal Users (change)

DiaryAttachments

Home New Open Messages Save Print Password Batch Change Association Logout

Daffy Duck (InForce - New - Committed) MSB00000000429

**TransACT NonRenew Pages**

Effective Date: 11-22-2007  
Schedule Date (optional): 02-10-2008  
Reason: Agent Request  
Detail: loss history

Abort Schedule

Policy Number: MSB000  
Status: InForce  
Product: SmallBo  
Term: 12 Month

Insured: Daffy Duck  
wooo hoo  
456-789-1235

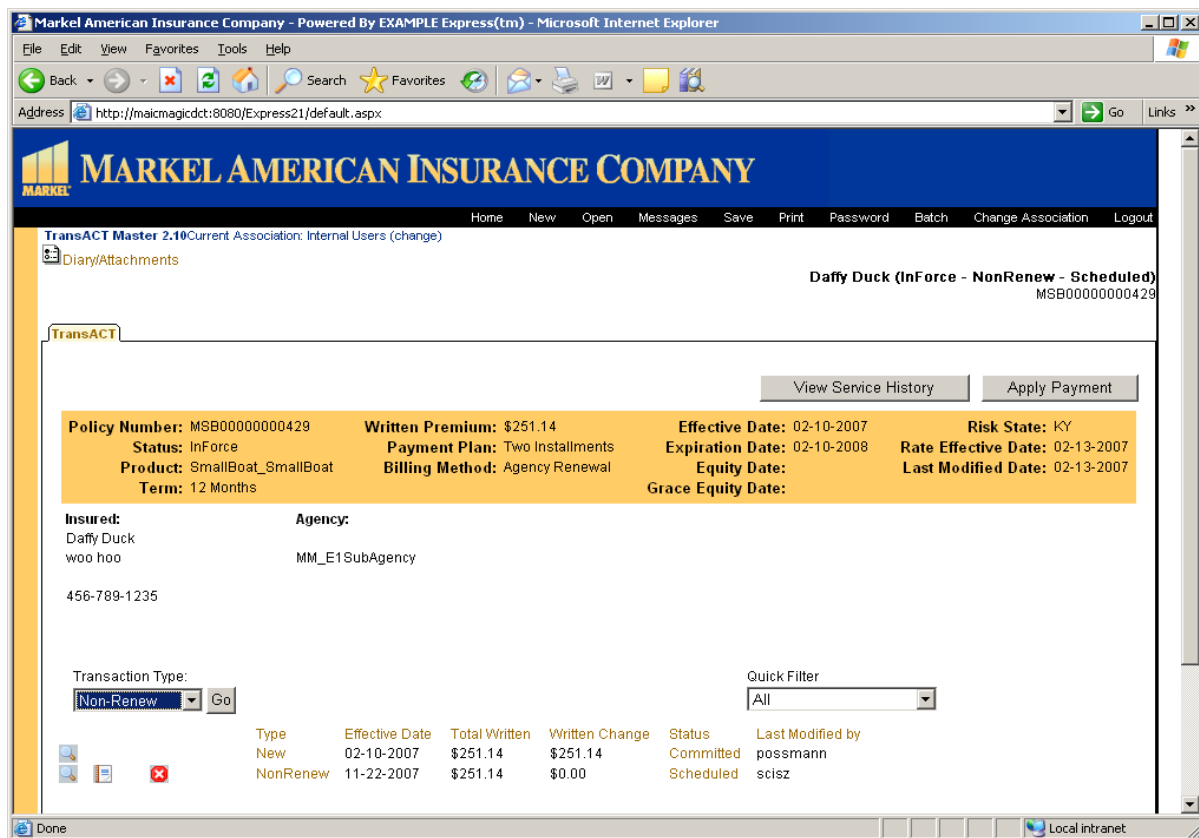
Transaction Type:

Apply Payment

Risk State: KY  
Effective Date: 02-13-2007  
Modified Date: 02-13-2007

67px 0px 0

Local intranet

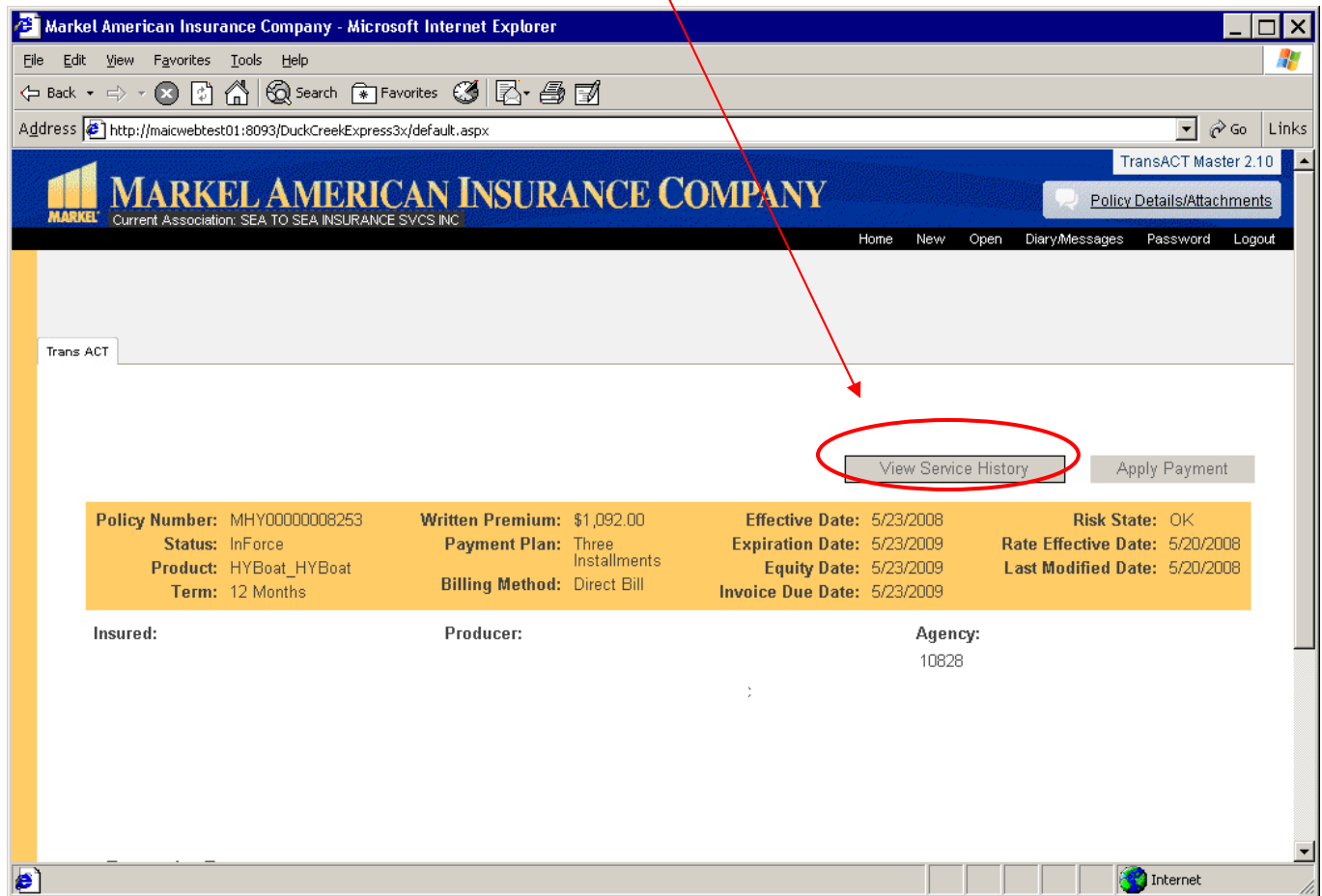


The [TransACT Screen](#) now shows that this policy has been scheduled for Non-renewal. Once the policy expiration date has passed, the non-renewal transaction will show as 'Committed'.

## VIEW SERVICE HISTORY

On the [TransACT Screen](#), there is a “View Service History” button. Clicking on this button will bring up a series of 4 screens:

- Claims History
- Payment History
- Refund History
- Service History



## CLAIMS HISTORY

The [Claims History](#) screen will display any Claim information associated with the policy. In the example shown below, there is a claim on the policy (see the boxed area). The Claim #, date of loss, claimant name, status, examiner, etc. are all displayed.

Market American Insurance Company - Microsoft Internet Explorer

Address: <http://maicwebtest01:8093/DuckCreekExpress3x/default.aspx>

Claims History | Payment History | Refund History

**Claims History**

<b>Policy Number:</b> MSB00000004229	<b>Premium Written:</b> \$0.00	<b>Effective Date:</b> 8/24/2008	<b>Risk State:</b> LA
<b>Status:</b> Cancelled	<b>Payment Plan:</b> Full Pay	<b>Expiration Date:</b> 8/24/2009	<b>Rate Effective Date:</b> 8/22/2007
<b>Product:</b> SmallBoat_SmallBoat	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b> 8/24/2008	<b>Last Modified Date:</b> 8/24/2008
<b>Term:</b> 12 Months		<b>Grace Equity Date:</b> 8/24/2008	

**Insured:**                      **Producer:**                      **Agency:**

Claim #	Loss Date	Reported Date	Claimant Name	Status	Closed Date	Coverage	Loss Pd	Examiner	Cause Of Loss
2	9/22/2007	9/24/2007	.	Closed	11/8/2007	Trailer	\$4,500.00	Casey Matthews	Theft - Equipment
	22/2007	9/24/2007	.	Closed	11/8/2007	Watercraft and Equipment	\$55,000.00	Casey Matthews	Theft - Boat

[Return](#)                      [Next](#)

By clicking the “Return” button from this screen you will be taken back to the main [TransACT Screen](#).

Clicking “Next” or clicking the Payment History Tab, will take you to the [Payment History Screen](#).

## PAYMENT HISTORY

The [Payment History](#) screen will display any payments applied to the policy, the installment schedule and the amounts due.

### Payment History

Policy Number: MHY00000011191	Premium Written: \$7,541.00	Effective Date: 07/30/2009	Risk State: MD
Status: In Force	Payment Plan: Six Installments	Expiration Date: 07/30/2010	Rate Effective Date: 7/7/2008
Product: HYBoat_HYBoat	Billing Method: Direct Bill	Equity Date: 02/12/2010	Last Modified Date: 2009-08-05
Term: 12 Months		Grace Equity Date: 11/27/2009	

### Amounts Due

Unpaid Prem	\$3,016.40
Unpaid Fees	\$0.00
Current Due	\$0.00
Past Due	\$0.00
Total Due	\$3,016.40

### Installment Schedule

Due Date	Prem Due	Inst Fee	Total Due	Pmt Amt	Writeoff	Is Billed
9/4/2009	\$2,262.30	\$5.00	\$2,267.30	\$2,267.30	\$0.00	<input checked="" type="checkbox"/>
9/28/2009	\$1,131.15	\$5.00	\$1,136.15	\$1,136.15	\$0.00	<input checked="" type="checkbox"/>
10/28/2009	\$1,131.15	\$5.00	\$1,136.15	\$1,136.15	\$0.00	<input checked="" type="checkbox"/>
11/27/2009	\$1,131.15	\$5.00	\$1,136.15	\$0.00	\$0.00	<input checked="" type="checkbox"/>
12/27/2009	\$1,131.15	\$0.00	\$1,131.15	\$0.00	\$0.00	<input type="checkbox"/>
1/26/2010	\$754.10	\$0.00	\$754.10	\$0.00	\$0.00	<input type="checkbox"/>

### Payment History

Policy Effective Date	Entered	Pay Type	Ref #	Control #	Payment	NSF Date
7/30/2008	7/15/2008	CR		2187401	\$2,031.50	
7/30/2008	9/26/2008	CR		2251735	\$1,018.25	
7/30/2008	10/29/2008	CR		2273965	\$1,018.25	
7/30/2008	11/26/2008	CR		2290433	\$1,018.75	
7/30/2008	12/26/2008	CR		2303322	\$1,688.25	
7/30/2008	2/5/2009	CR		2325055	\$680.50	
7/30/2009	7/29/2009	BM	61B3A603-471C-45FA-8FC8-0AE48DC53625	2472452	\$2,132.30	
7/30/2009	9/2/2009	BM	78D63259-E6F3-4D48-9DC0-BAA44CDFFB74	2497396	\$135.00	
7/30/2009	9/26/2009	BM	180CBF2C-164E-42FE-B465-80AF68FEB9CB	2513418	\$1,136.15	
7/30/2009	11/4/2009	BM	BD41E656-1F1F-4AFD-B02A-B6491825C4B9	2534695	\$1,136.15	

[Return](#)

The **Amounts Due** section displays the Unpaid Premium, Unpaid Fees, Current Due, Past Due and Total Due.

The **Installment Schedule** section displays the date due, premium due, installment fees and payment amounts applied to the billing dates.

The **Payment History** section displays the policy effective date, payment type, a reference number (if applicable), a control number, the amount of the payment and an NSF Date (if applicable).

By clicking the “Return” button from this screen you will be taken back to the main [TransACT Screen](#).

Clicking “Next” or clicking the Refund History Tab, will take you to the [Refund History Screen](#).

# REFUND HISTORY

The [Refund History](#) screen will show the date of the refund, the payee, the amount and a reference number.

Claims HistoryPayment HistoryRefund HistoryService History

Refund History

Policy Number: MHY00000011191

Status: In Force

Product: HYBoat\_HYBoat

Term: 12 Months

Premium Written: \$7,541.00

Payment Plan: Six Installments

Billing Method: Direct Bill

Effective Date: 07/30/2009

Expiration Date: 07/30/2010

Equity Date: 02/12/2010

Grace Equity Date: 11/27/2009

Risk State: MD

Rate Effective Date: 7/7/2008

Last Modified Date: 2009-08-05

FINANCE@BESEMER.COM

866-936-1879

Date	Payee	Amount	Reference Number
2/18/2009		\$670.50	0000106513

Return

Previous

Next

By clicking the “Return” button from this screen you will be taken back to the main [TransACT Screen](#).

## Service History

The [Service History](#) screen will display the activity history of the policy.

**MARKEL AMERICAN INSURANCE COMPANY**

MAIC SmallBoat FL (00.02) Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

Claims History | Payment History | Refund History | **Service History**

**Service History**

<b>Policy Number:</b> MSB00000004543	<b>Premium Written:</b> \$645.39	<b>Effective Date:</b> 10-18-2007	<b>Risk State:</b> FL
<b>Status:</b> In Force	<b>Payment Plan:</b> Full Pay	<b>Expiration Date:</b> 10-18-2008	<b>Rate Effective Date:</b> 10-18-2007
<b>Product:</b> SmallBoat_SmallBoat	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b> 06-30-2008	<b>Last Modified Date:</b> 10-18-2007
<b>Term:</b> 12 Months		<b>Grace Equity Date:</b> 11-17-2007	

**Insured:**  
OST POLICY TEST  
FB 15277  
Barefoot Beach, FL 34134  
262-548-9880

**Producer:**  
90700-0000001  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAWKEE, WI 53072-0906  
800-236-2862

**Agency:**  
90700  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAWKEE, WI 53072-0906  
800-236-2862

**Amounts Due**

<b>Unpaid Prem</b>	\$206.03
<b>Unpaid Fees</b>	\$0.00
<b>Current Due</b>	\$0.00
<b>Past Due</b>	\$0.00
<b>Total Due</b>	\$206.03

**Installment Schedule**

Due Date	Prem Due	Inst Fee	Total Due	Pmt Amt	Writeoff	Is Billed
11-17-2007	\$632.24	\$0.00	\$632.24	\$627.21	\$0.00	<input type="checkbox"/>

**Account Transaction History**

Action	Effective Date	Entered Date	Written	Fees	Taxes	Total Due	Pmt/WO	An. Prem	Booked Date	User ID	Control #
New Business	10-18-2007	10-18-2007	\$621.00	\$0.00	\$6.21	\$627.21	\$0.00	\$627.21		kramsby	
Change	10-18-2007	10-18-2007	\$18.00	\$0.00	\$0.18	\$18.18	\$0.00	\$18.18		kramsby	
Change	01-18-2008	10-18-2007	\$185.00	\$0.00	\$1.85	\$186.85	\$0.00	\$250.48		kramsby	
Change	01-18-2008	10-18-2007	\$13.00	\$0.00	\$0.13	\$13.13	\$0.00	\$250.48		kramsby	
Policy Change	01-18-2008	10-18-2007	-\$185.00	\$0.00	-\$1.85	-\$186.85	\$0.00	-\$250.48		kramsby	
Cash Received	10-18-2007	10-18-2007	\$0.00	\$0.00	\$0.00	\$0.00	\$627.21	\$0.00		kramsby	1949797

[Return](#)

[Back](#)

The **Amounts Due** section displays the Unpaid Premium, Unpaid Fees, Current Due, Past Due and Total Due.

The **Installment Schedule** section displays the date due, premium due, installment fees and payment amounts applied to the billing dates.

The **Account Transaction History** will show you the actual account transaction history as it happens. It will display write-offs, money being unapplied and re-applied during the cancel/reissue-reinstatement process, etc. which will give you more information without having to directly contact our Accounting Department.

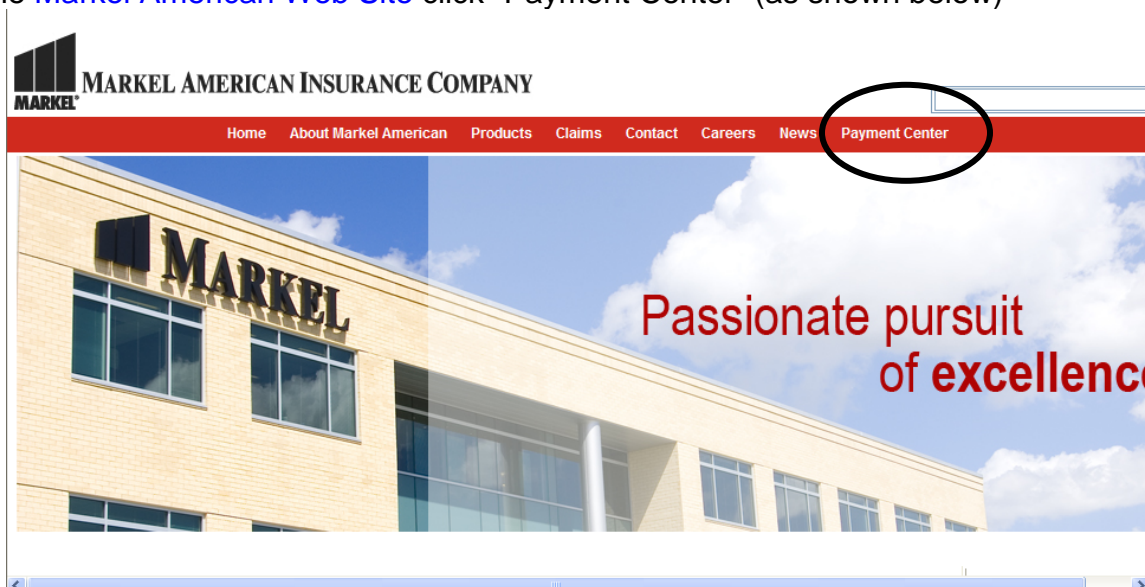
By clicking the "Return" button from this screen you will be taken back to the main [TransACT Screen](#).

## ACCOUNTING PROCEDURES

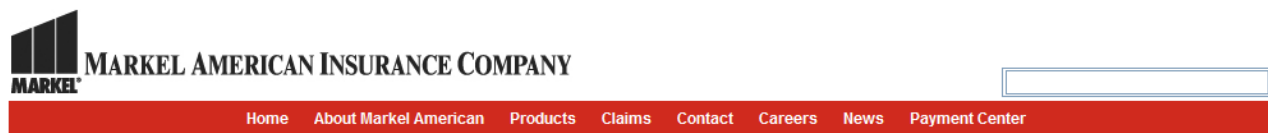
### APPLY A PAYMENT TO A POLICY

There are two ways to apply a payment to a policy. You can log on to MarkelAmerican.com and click on Payment Center or you can apply a payment directly from the Trans Act Screen in Magic.

1. From the [Markel American Web Site](#) click "Payment Center" (as shown below)



2. Click on "Agent Payment" (as shown below)



#### Payment Center

##### Customer Payments

###### [Make a one time payment](#)

You can use your credit card, debit card or personal check to make an immediate payment with our payment administrator, Bill Matrix. Markel will be notified immediately upon the completion of the payment and it will be credited to your account.

###### [Sign up for recurring payments](#)

You can now sign up to have your payments automatically withdrawn from a designated bank account. No hassle, no stamps, no forgetting to pay your bill. We'll do all the work for you. Sign up today to make insuring your fun even easier.

###### [Call one of our specialists](#)

You can also make payments via credit card, debit card or check by calling one of our specialists at (800) 236-2862 and pressing "5."


##### Agent Payments

###### [Make a payment](#)

Follow the link above to make payment on an in force account via credit card, debit card or personal check. These payments will be processed through Markel's payment administrator, Bill Matrix.



3. Enter the Policy Number, the Mailing Zip Code and click Continue. At this point, the Billmatrix screens will be the same no matter how you selected to enter the payment.



## Make A Payment

Welcome to the online bill payment system for Markel American Insurance Company.

Please have a copy of the Markel American Insurance Company bill available for this payment transaction.

Please enter the full Policy number as it appears on your Markel American Insurance Company bill.

Policy Number  Enter all numbers up to the dash

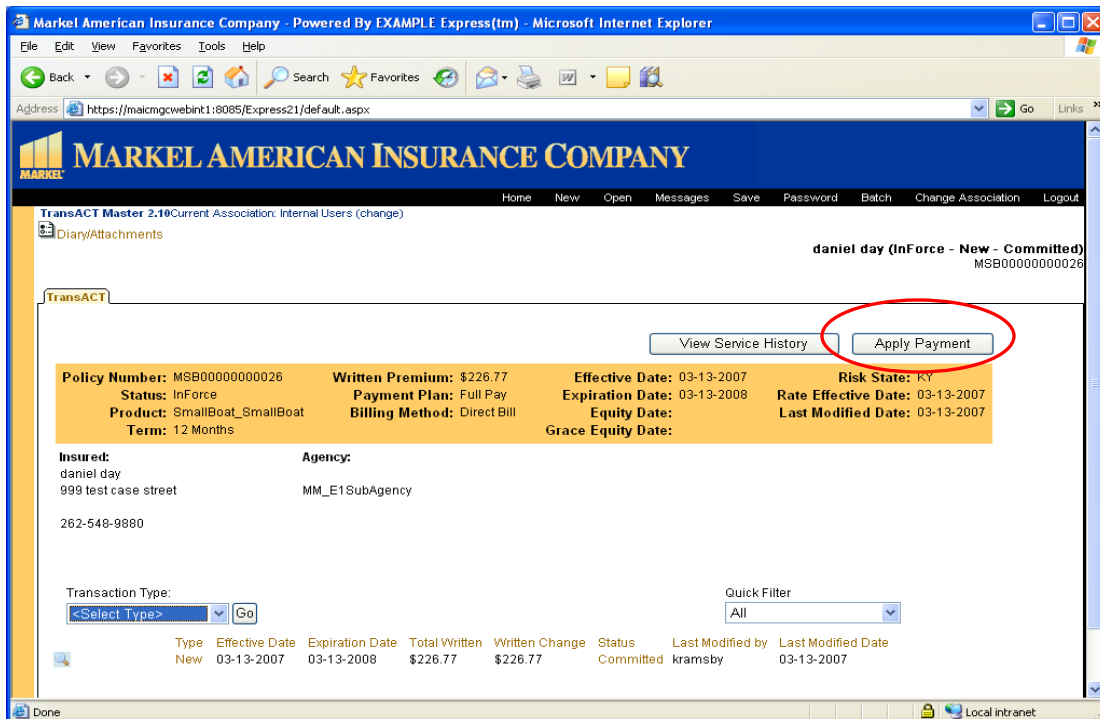
Mailing Zip Code  5-digit

[Continue >>](#)

The information you submit is secure. Click [here](#) to verify.  
Your [privacy](#) is important.

powered by **billmatrix**

1. From the [TransACT Screen](#), click the “Apply Payment” button (as shown below).



Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: <https://maicmgwebint1:8085/Express21/default.aspx>

### MARKEL AMERICAN INSURANCE COMPANY

Home New Open Messages Save Password Batch Change Association Logout

TransACT Master 2.10 Current Association: Internal Users (change)

Diary/Attachments

daniel day (InForce - New - Committed)  
MSB00000000026

TransACT

View Service History **Apply Payment**

<b>Policy Number:</b> MSB00000000026	<b>Written Premium:</b> \$226.77	<b>Effective Date:</b> 03-13-2007	<b>Risk State:</b> KY
<b>Status:</b> InForce	<b>Payment Plan:</b> Full Pay	<b>Expiration Date:</b> 03-13-2008	<b>Rate Effective Date:</b> 03-13-2007
<b>Product:</b> SmallBoat_SmallBoat	<b>Billing Method:</b> Direct Bill	<b>Equity Date:</b>	<b>Last Modified Date:</b> 03-13-2007
<b>Term:</b> 12 Months		<b>Grace Equity Date:</b>	

**Insured:**  
daniel day  
999 test case street  
262-548-9880






**Agency:**  
MM\_E1SubAgency

Transaction Type:  Go







Quick Filter:

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	03-13-2007	03-13-2008	\$226.77	\$226.77	Committed	krambsy	03-13-2007

- You will be taken to the directly to the Select Payment Type screen in Billmatrix. You will enter the "Payment Amount" and Select "Payment Type", you can select from Credit Card, Electronic Check and ATM Debit Card. Click Continue.



## Select Payment Type



You may make payments with an electronic check, ATM Debit card with a PULSE, STAR, or ACCEL logo or Visa, MasterCard, Discover or check card. **Billmatrix does not accept Money Orders or Cashiers Checks.** Enter the amount you wish to pay and select the payment type.

Policy Number 123-45784512543827  
Current Due \$XXX.XX  
Total Balance Due \$XXX.XX

Payments Received	
Date	Amount
MM/DD/YYYY	\$ XXX.XX
MM/DD/YYYY	\$ XXX.XX
MM/DD/YYYY	\$ XXX.XX
MM/DD/YYYY	\$ XXX.XX

Installment Schedule		
Due Date	Amount	Installment Fee
MM/DD/YYYY	\$ XXX.XX	\$XXX.XX
MM/DD/YYYY	\$ XXX.XX	\$XXX.XX
MM/DD/YYYY	\$ XXX.XX	\$XXX.XX
MM/DD/YYYY	\$ XXX.XX	\$XXX.XX

Payment Amount \$

Select Payment Type




[<< Back](#) [Continue >>](#)

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- Depending on the type of payment you selected you will either enter the credit card, ATM Debit card or the checking account information. Once all the required information is entered click to Continue.

### Credit/Debit Card information Screen

### Enter Card Information



Please enter the card number, expiration date (if shown on card), and 5-digit zip code where you receive your card statement. When you are finished, click the Continue button to review your payment information.

Card Number  without dashes or spaces

Card Expiration Date  -MONTH-  /  -YEAR-  if shown on card

Zip Code  from card billing address

[<< Back](#) [Continue >>](#)

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## Check Information Screen

**Enter Check Information**






Enter the check routing number and account number from the Magnetic Ink Character Recognition (MICR) line at the bottom of your check. When you are finished, click the Continue button to review your payment information.

Last Name or Commercial Name on Account	<input type="text"/>	<i>Use only letters in the Name on Account fields.</i>  <a href="#">Need help locating this information?</a>
First Name on Account	<input type="text"/>	
Check Routing Number	<input type="text"/>	
Account Number	<input type="text"/>	

For assistance entering check information, please call Billmatrix Customer Care at 1-866-657-0187.

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**billmatrix**

4. Enter all the required payment information and select Continue to the next screen, or select Back to change your payment amount or payment type.
5. Confirm all the information you entered is correct. Select Authorize to process the payment or select Back to change any information you have entered.



### Confirm Payment Receipt

Your payment has been authorized. Your confirmation number is **XXXXXX**.

The payment will be posted to the insured's account within the next 24 hours.

Please [print](#) the following summary information for your records:

Policy Number	123456789
Payment Method	NETWORK
Card Number	*****0101
Total	\$XX.XX

Thank you for using the online bill payment system!

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**billmatrix**

6. Once the payment has processed you can either Exit out of Billmatrix or select Make Another Payment.

## USER MAINTENANCE

If changes (deletion or addition) in staffing occur, MAIC must be notified in writing by the agency Principal or other person designated by the Principal to effect user changes.

The Request to Amend Established User document will need be sent to MAIC's Technical Services Dept. at [PTS@markelcorp.com](mailto:PTS@markelcorp.com) or faxed to 262-547-9436. Once they have completed the User change, they will confirm that the user has either been disabled, or if a new user, their new password.

Changes to sub-producers should also be communicated in the same manner.

The User change form can be found on [www.markelamerican.com](http://www.markelamerican.com) under the Agent Only access as well as in the Appendix at the back of this manual.

## AGENT MAINTENANCE

To setup a sub-producer in the system, a written request must be provided by the contracted General Agent. The Request to Add a Sub-Producer form will need to be sent to the Product Services Group at [PSG@markelcorp.com](mailto:PSG@markelcorp.com). The information necessary to setup the sub-producer will be provided to the contracted General Agent to deliver to the sub-producer.

The Agent Set-up Form can be found on [www.markelamerican.com](http://www.markelamerican.com) under the Agent Only access as well as in the Appendix at the back of this manual.

## TECHNICAL ASSISTANCE

For technical assistance with the MAGIC system, please contact MAIC's Technical Support Department at 1-800-236-2862 x.3334.

## APPENDIX

### Request to Add a Sub-Producer

#### **Markel American Insurance Company** **Request to add a SubProducer**

Email to: psg@markelcorp.com -or- fax: 262-548-0117

Due to security requirements brought on by the Sarbanes Oxley Act, each of your subproducers must be assigned an individual user ID and password that will be connecting to our system. Complete a separate form for each subproducer. In order for us to begin setting up this Producer remotely, we need the information provided below.

Please complete the following information:

<b>GA Agency Name:</b>		<b>GA Number:</b>	
<b>SubProducer Name:</b>		<b>SubProducer Number:</b>	
<b>SubProducer Federal ID #:</b>		<b>Is SubProducer Incorporated?</b>	<input type="checkbox"/> YES <input type="checkbox"/> NO
<b>SubProducer Website Address:</b>			
<b>SubProducer Address:</b>			
<b>SubProducer City, State &amp; Zip:</b>			
<b>SubProducer Phone:</b>		<b>SubProducer Fax Number:</b>	
<b>Form Contact Name:</b>		<b>Form Contact Email address:</b>	

PLEASE STATE REQUEST BELOW: